HandicapMaster®

User Manual

HandicapMaster®

Competitions and Handicapping Software

by © HandicapMaster Limited 2023

Welcome to HandicapMaster®.

HandicapMaster® is Competitions and Handicapping Software for Golf Clubs and Societies. We thank you for your interest in HandicapMaster® and hope you will find this Manual to be of help.

We always value customer feedback. If you have any comments about this manual, please do not hesitate to contact us.

Should you need any additional assistance with HandicapMaster®, please do not hesitate to contact us.

Thank you.

E-mail: support@handicapmaster.org
Web Site: https://www.handicapmaster.org

HandicapMaster®

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Chapter

1

HandicapMaster

1 HandicapMaster

HandicapMaster®

Local Handicapping Editions

Online Help System

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Chapter

2

Introduction

2   Introduction

Welcome to HandicapMaster. HandicapMaster is a windows-based 'point and click' program for Golf Club or Society Competition and Handicap Secretaries to help them administer Competitions and Golf Handicaps.

HandicapMaster supports Handicapping in two formats. These are

- *Local* Handicapping

- *World Handicap System®* handicapping

These can each be run as *Silver* edition or *Gold* Edition.

Local Handicapping

Local Handicapping is for organisations who wish to operate their own handicapping rules, such as Golf Societies. Handicaps may be calculated as the "best X from Y recent scores" for each player (parameters may be chosen to suit the organisation), with additional options to deduct strokes based upon where players finish in a competition. Alternatively, handicaps may be calculated using an "incremental" process.

World Handicap System⊛

World handicap System handicapping edition is for organisations who are affiliated to a National Union, Federation or Association, which in turn has been licenced by the USGA and/or R&A to operate WHS handicaps in their region. HandicapMaster may only be operated in selected regions.

This help system covers the **Local Handicapping** editions.

The HandicapMaster database may be located on-premises or be located in the 'Cloud'.

Trademarks

HandicapMaster and **Master Scoreboard** are Registered Trademarks of HandicapMaster Ltd.

The following trademarks and service marks are owned or licensed by the USGA and The R&A and may only be used in conjunction with the World Handicap System; all rights reserved:

- **World Handicap System ™,**

- **WHS ™ ,**

- **Handicap Index ® ,**

- **Score Differential ™,**

- **Low Handicap Index ™,**

- **Course Handicap ™,**

- **Playing Handicap ™,**

- **Course Rating ™,**

- **Bogey Rating ™,**

- **Slope Rating ™.**

Chapter 3

How to buy HandicapMaster?

3   How to buy HandicapMaster?

Product Summary
https://www.handicapmaster.org/products

Direct Order Link
https://www.handicapmaster.org/shop

Home page
https://www.handicapmaster.org/home.php

E-mail Support
support@handicapmaster.org

Address
HandicapMaster Limited,
15 Adlington Drive,
Sandbach,
Cheshire.
CW11 1DX.
United Kingdom

Chapter

4

The HandicapMaster Desktop

4 The HandicapMaster Desktop

4.1 Introduction

HandicapMaster is known for its neat and intuitive user interface. The heart of the program is the Task or Folder pane alongside the Main Window pane. This is situated in the HandicapMaster [desktop](#).

- **Toolbars**

The most common tasks in HandicapMaster may be accomplished using the buttons along the top of the main desktop.

Other Toolbars become available for printing reports, writing letters, etc.

- **Context sensitive help**

HandicapMaster has an extensive, context-sensitive help system. These can easily be accessed by pressing Function Key F1 or clicking buttons labelled 'Help'

4.2   The Desktop

Below is the main HandicapMaster desktop. Scroll down for a detailed description.
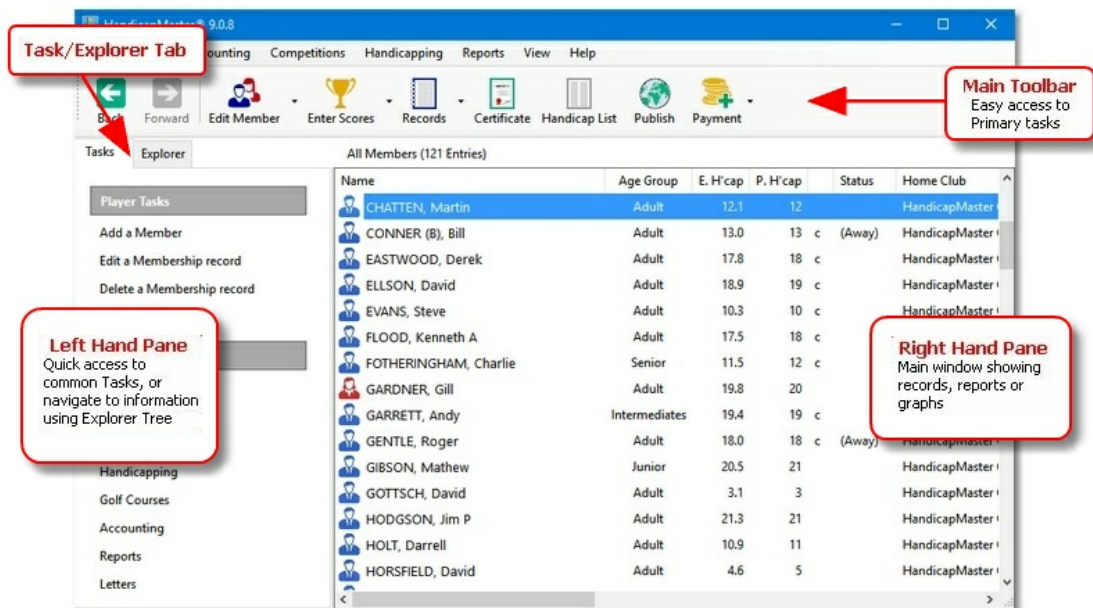
Main Toolbar

The Main Toolbar, situated across the top of the HandicapMaster desktop, provides access to the most common tasks such as creating a list of handicaps, producing a Handicap Certificate, etc.

Tasks/Explorer Tab

The Tasks/Explorer Tab lets you choose between displaying quick access to Tasks you may wish to perform in HandicapMaster, or searching your records using a Windows Explorer style Tree (not shown in the picture). Both of these are shown in the Left Hand Pane.

Left Hand Pane

This pane shows either

- Tasks you may wish to perform, or

- Explorer Tree to search and locate records in the database.

When showing Tasks you may wish to perform (as shown above), the 'popular' tasks from a given subject i.e Handicapping, Membership or Competitions are displayed in the upper box. Click over any Task listed, to initiate the task. The lower box shows links to other subjects in HandicapMaster.

For a more detailed view of the records in the database, click the Explorer tab. The left hand pane now shows an Explorer Tree, with records categorised into folders and collections. Click any item in the tree to display the applicable records in the Right Hand Pane.

Right Hand Pane

The Right Hand Pane shows the records in the HandicapMaster database. Depending upon the task being undertaken, the data may be shown

- as a list (as shown above) in a grid.

- in a report that can be printed, for example, or

- pictorially, as a graph on screen.

See Also

- [Re-order information in Right Hand Pane Grid](#)

- [Opening and Closing the Left hand Pane](#)

4.3   Re-order information in Right Hand Pane Grid

The order of records displayed in the grid in the Right Hand Pane may be changed, if desired.

Change the order of records in the Grid

1.   Click over a heading above a chosen column. The grid will be re-ordered alphabetically according to the data in the chosen column.

Change and reset the order of Columns in the Grid

1. Click on a column heading with the Left mouse button and hold the mouse button down. Then drag the column heading to the left or the right of the other columns to change the order of the columns. The order will also be remembered and used the next time you view the list.

2. To reset the columns to the default order please go to the Options and select Set Columns to Default order in Lists

4.4   Opening and Closing the Left Hand Pane

The Left Hand Pane (Tasks and Explorer Pane) may be hidden if required. This may help when displaying reports on a low screen resolution, for example.

To Open or Close the Left Hand Pane

1.   Do one of the following:

- On the **View** menu, click **Open Task & Explorer Pane** or **Close Task & Explorer Pane**, or

- Press shortcut key **F6**

4.5   Keyboard Shortcuts

You can quickly accomplish tasks you perform frequently by using shortcut keys — one or more keys you press on the keyboard to complete a task.

General Shortcuts

F1	Display HandicapMaster Help.
F6	Open or Close the Left Hand Pane.
CTRL+P	Print Report

Membership Shortcuts

CTRL+N	Add a new Member
CTRL+E	Edit a Member record
CTRL+D	Delete a Member record
CTRL+T	Write a Letter to Members

When displaying the ALL MEMBERS list:

INSERT	Add a new Member
ENTER	Edit the selected Member
DELETE	Delete the selected Member

Competition Shortcuts

CTRL+C	Set up a Template
CTRL+V	View Results
CTRL+Z	Undo a Competition or Handicapping Event

When displaying the COMPETITION TEMPLATES list:

INSERT	Add a Competition Template
ENTER	Edit the selected Competition Template
DELETE	Delete the selected Competition Template

When displaying the CLOSED COMPETITIONS list:

ENTER	View results of the selected Competition
DELETE	Undo the selected Competition

When displaying the KNOCK-OUT COMPETITIONS list:

INSERT	Add a new Knock-out Competition
ENTER	Update KO Competitions with match results
DELETE	Delete the selected Knock-out Competition

Handicapping Shortcuts

CTRL+G	Enter a General Play Score for a Player
CTRL+A	Enter an Away Competition Score for a Player
CTRL+L	Show Handicap List Report
CTRL+O	Run Order of Merit
SHIFT+F1	View a Player's Handicap Record in tabular format
SHIFT+F2	View a Player's Handicap Record in printable report format
SHIFT+F3	View a Player's Handicap Record in graphical format

Shortcuts when writing Letters

CTRL+Z	Undo
CTRL+X	Cut

CTRL+V   Paste
CTRL+F   Insert Field
When displaying the LETTERS list:
     INSERT   Write a new Letter
     ENTER   Edit and re-send an existing Letter
     DELETE   Delete the selected Letter

Chapter

5

Getting Started with HandicapMaster

5 Getting Started with HandicapMaster

5.1 Copyright and Warranty

Please carefully read the terms and conditions before using this software. Unless you have a different licence agreement signed by HandicapMaster Limited your use of this software indicates your acceptance of this licence agreement and warranty.

Licenced Version
A licenced version may be freely replicated provided all uses of the copies remains with the sole purpose of processing on behalf of the licenced party.

Reverse Engineering
You may not reverse engineer, de-compile or disassemble the software without prior agreement of the author.

Database access
You may not access the HandicapMaster database other than in the manner intended by using the software provided. Direct access to the database using Microsoft Access or other software without the authors prior consent is forbidden.

Disclaimer of Warranty
THIS SOFTWARE AND ACCOMPANYING FILES ARE PROVIDED 'AS IS' AND WITHOUT WARRANTIES AS TO PERFORMANCE OR MERCHANTABILITY OR ANY OTHER WARRANTIES WHETHER EXPRESSED OR SUPPLIED. Because of the various hardware and software environments into which HandicapMaster may be put, no warranty of fitness for a particular purpose is offered. Good data processing procedure dictates that any program be thoroughly tested with non-critical data before relying on it. The user must assume the entire risk of using the program. Any liability of the seller will be limited exclusively to product replacement or refund of any purchase price.

5.2   Getting Started

How to Start HandicapMaster

1. Do one of the following:

    - Select HandicapMaster from the Start Bar, or

    - double-click over the Icon on the Desktop, or

    - double-click over HandicapMaster.EXE from within Windows Explorer.

How to Log on to HandicapMaster

1. Users are normally required to log on to HandicapMaster. The default password is not set where the HandicapMaster database is on-premises. A cloud database will always have a password set.

2. The password may be changed by choosing the [Change Password](#) option from the File menu.

If you have lost the Password

In the event of the password being lost or forgotten, please initially contact your HandicapMaster administrator.

If your HandicapMaster administrator is unable to assist please contact the supplier.

5.3   Licencing

It is requested that you run HandicapMaster with a valid Licence Key.

You will be provided with a licence key for your access to the HandicapMaster when you purchase a subscription.

Enter your Licence Key in the Licence Key window.

To enter your Licence Key

We recommend that you cut and paste the key from any electronic documentation that is provided with the key.

On the initial window, click **Enter Licence Key** button. You will now be able to enter the Key.

If the Licence Key is not accepted

If you believe you have entered this correctly and still cannot get the licence key accepted, please contact the supplier.

Chapter

6

Maintaining Club Memberships

6   Maintaining Club Memberships

6.1   Introduction

<table><tr><td>**Managing the Membership Records**</td></tr></table>

The information relating to any one Member is called the 'membership record'. This chapter describes those steps required to maintain the membership records for your club and gives a description of each of the items of information that can be recorded.

6.2 Adding, modifying and deleting Membership records

6.2.1 Add a new Member

To add a new Member to HandicapMaster

To add a member who is new to your club, please do the following:

1. On the **Players** menu, click **New Member**.

2. Enter the Membership Information using the membership record fields provided.

Notes

- **TIP**: It is recommended that the member's name should be entered in 'titled case' - that is, Capital First letter and lower case secondary letters. This will improve the appearance of the reports.

  I.e. 'Smith' rather than 'SMITH'.

  The combination of First Name + Middle Initials + Last Name + Home Club must be unique for each member.

  You should change the **Gender** box if the member is a lady.

  Two of the Age Groups provided may be renamed using Options.

Home Club

This field is set to the nominated system Home Club by default. Should the member be an 'away' member, please review Change Home Member to an Away Member.

If the member belongs to any other clubs, these may be added to the **Also A Member Of** list by clicking **Add Club to List**.

See Also

- Modify a Member record

- Delete a member (Mark as Past Member)

- Recover a previously deleted Member

- Membership record fields

- Change Away Member to Home Member

- Change Away Member's Home Club

- Change Home Member to an Away Member

- Basic Player Subscription recording and management

6.2.2 Modify a Member record

To modify the details of an existing membership record

1. Do one of the following:

- In the Players list, select a Member and press ENTER Key, or

- In the Players list, select a Member, then on the **Players** menu, click **Edit Member**, or

- On the **Players** menu, click **Edit Member** and select a Member from the list displayed.

2.   Modify the Membership Information using the membership record fields provided.

To modify the details of a Past Member

1.   Do one of the following:

- In the Past Members list, select a Member and press ENTER Key,

- In the Past Members list, select a Member right click and select **Edit** from the popup menu.

- In the Past Members list, select a Member right then select **Edit a Membership record** from the Previous Member Tasks

2.   Modify the Membership Information using the membership record fields provided.

Notes:

- When editing Past Member records a reduced range of membership record fields are available.

See Also

- Add a new Member

- Delete a member (Mark as Past Member)

- Recover a previously deleted Member

- Membership record fields

- Change Away Member to Home Member

- Change Away Member's Home Club

- Change Home Member to an Away Member

- Basic Player Subscription recording and management

6.2.3   Delete a Member (mark as a Past Member)

If a person has ceased their membership with your club you will have to delete their membership record. They will be marked as a Past Member in the database.

To delete a Member or an away Member

1.   Do one of the following:

- In the All Members or Away Members list, select a Member and press DELETE Key, or

- In the All Members or Away Members list, select a Member, then on the **Players** menu, click **Delete Member**, or

- On the **Players** menu, click **Delete Member** and select a Member from the list displayed.

To delete multiple Members

---

1. In the All Members or Away Members list, right-click and select **Delete Multiple Members**.

2. Tick the box along side those members to be deleted

3. Click **OK** and confirm the deletion.

To delete ALL Member records

1. In the All Members or Away Members list, right-click and select **Delete Multiple Members**.

2. Click **Select All**

3. Click **OK** and confirm the deletion

Notes:

- It should be noted that when you delete a member using this option, the membership record is not removed from the system. Rather it is marked as 'deleted', although the information is still held within HandicapMaster. By viewing the 'Past Members and past Visitors' list, all of the deleted membership records are displayed.

- Past Members may be e-mailed.

- When HandicapMaster is linked to an external membership system it is not possible to delete members. The member must be deleted or 'resigned' in the external membership system, which will place the record in the 'Past Members and past Visitors' list.

See Also

- Add a new Member

- Modify a Member record

- Recover a previously deleted Member

- Membership record fields

- Change Away Member to Home Member

- Change Away Member's Home Club

- Change Home Member to an Away Member

- Basic Player Subscription recording and management

6.2.4   Recover a previously deleted Member

A 'Past Member' record may be recovered and returned to current membership status.

To recover a previously deleted membership record

1.   On the **Players** menu, click **Undelete**.

2.   Choose a Member or Visitor to recover and tick the box alongside their name.

Notes:

- When HandicapMaster is linked to an external membership system it is not possible to undelete members. The member must be undeleted or 'reinstated' in the external membership system, which

will move the record in the 'Past Members and past Visitors' list to the 'All Members' list.

See Also

- [Add a new Member](#)

- [Modify a Member record](#)

- [Delete a member (Mark as Past Member)](#)

- [Membership record fields](#)

- [Change Away Member to Home Member](#)

- [Change Away Member's Home Club](#)

- [Change Home Member to an Away Member](#)

- [Basic Player Subscription recording and management](#)

6.2.5   Membership record fields

The following information may be recorded for each member (Fields shown in red are compulsory fields).

Details Tab

First Name
The member's Given name (sometimes known as Christian name).

Middle Initials
The initials of the member.

Last Name
The member's Surname (last name).

Title
The title of the member.

Gender
Whether the member is Male or Female.

Date of Birth
If checked, identifies the members' Date of Birth.
To enter a Date of Birth, tick the box and then update the date. The date fields may be over typed, or click Day, Month or Year and and use the spin buttons.

Age Group
Identifies the age group of the member.
If a Date of Birth is provided for the member then the Age Group will be pre-selected. It can be changed if required. Available values are Junior, Adult, Senior or two 'others'. The 'Others' Age Groups may be renamed using [Options](#).

Category
The category of the member's membership. Used when producing the Handicap List to categorise members.

Position on Committee
Used to identify whether the member currently holds a position on a club committee. Documentary only.

National ID. (Not available with Local Handicapping)
The Member Number for the player on their national WHS handicapping service. Should be an eight digit number in Ireland and 10 digit number in England, Scotland and Wales.

Member No.
The number of the member's membership. Documentary only.

Member Card No. (Not available with Local Handicapping)
The Membership Card Number for this player. Used for players entering their competition scores using Magnetic 'Swipe' Cards.

Player Identification Number (PIN)
A three to six digit number that players may use to enter their competition scores. Randomly generated number that can be overridden, but must be unique for each player. By default, number will be 4 Digits in length.

Locker Number (Not available with Local Handicapping)
The number of the Locker assigned to this player.

Contact Details Tab

Address, Town, County, Postcode.
The address of the member. Used when producing letters to be addressed to the member.

Telephone:
The telephone number of the member. Documentary only.

Mobile:
The mobile telephone number of the member. Documentary only.

Other Tel:
The telephone or Fax number of the member. Documentary only.

E-mail:
The E-mail address of the member. Documentary only.

Data Protection

Use this section to record information related to management of personal data and General Data Protection Regulation (GDPR)

Consent given to receive Electronic communication
Tick this option if your organisation's procedure to request opt in to electronic communication such as e-mail has been obtained from the member.

IMPORTANT NOTE: If this option is NOT ticked then e-mails will NOT be sent to the member even if an e-mail address is recorded.

Parent/Guardian Consent obtained (if required)
Tick if required. Documentary only.

Note: the General Data Protection Regulation documentation indicates that the age of consent for a Child can range from 13 to 16 depending on the location. This age range may not match your age for Junior's

Data Protection Notes
You can record any notes related to Data protection if required.

Handicapping Tab

The options available depend upon the edition of HandicapMaster being used. Some of these may not be visible in your edition of HandicapMaster.

Where the edition allows for players handicap home clubs to be set, then:

This Player's Handicap is maintained at
Used to indicate whether the Player is a "Home" or "Away" player for handicapping purposes. That is, where their Handicap records are maintained.

Select Home Club...
This button is displayed if the Player has been identified as an "Away" player and is used to identify the Player's Home Club.

Record Initial Handicap Card
This link is displayed if the player has not previously been allocated a Handicap on the system. Click this link to record a scorecard the player has submitted for the purpose of gaining a Handicap.

Where the edition does not allow for handicap Home Clubs to be managed through HandicapMaster, then

Check Home Club ...
Look up the latest Home Club recorded for this player on the Handicapping Service server.

Also a member of
A list of all other clubs (other than the member's Home Club) to which this member belongs. Use Add club to List... and Remove Club from List... buttons to add and remove golf clubs from this list.

Master Scoreboard Tab

Hide Name of Member using 'Name Withheld'
Masks the player's name on the Master Scoreboard web site, if data is uploaded to Master Scoreboard web site.

Set player's password on Master Scoreboard
You may use this link to set a player's password on Master Scoreboard, if you have the Master Scoreboard 'Individual passwords' feature turned on.

Subscriptions Tab

Date Joined
If checked, allows a date to be recorded representing when the Member joined the club.

Date Renewed
If checked, allows a date to be recorded representing when the Member last renewed their membership. (Filled in automatically when the Subscriptions Option is installed)

Date Expires
If checked, allows a date to be recorded representing when the Member's membership is due to expire. (Filled in automatically when the Subscriptions Option is installed)

Date Subscription Paid
If checked, allows a date to be recorded representing when the Member paid their subscription for the current year. (Filled in automatically when the Subscriptions Option is installed)

Method of Payment
Identifies the method by which the Member paid their subscription for the year. Click List to change the method used.

Amount Paid
Itemises the amount paid by the Member.

If the Subscriptions Option is installed then there are additional features:

Subscription Template
The Subscription template assigned to this member.

Default Method of Payment
Identifies the method by which the Member paid their subscription for the year. Click to change the method used.

If **Direct Debit** is the selected method of payment then the following additional fields are displayed:

A Bank Details section will be displayed containing:

- Account Name   (a string up to 20 characters)

- Account Number   (an 8 digit number)

- Sort Code   (AA-BB-CC where A,B and C are numbers)

- Reference   (a string of up to 18 characters)

The option Direct Debit Instruction Set-up Completed should ONLY be ticked when the 'New Instruction' for this member has been confirmed by your bank.

Please review the Direct Debit section within this document for more details.

Send Subscriptions, Invoices, Receipts by E-mail
If checked, enables subscriptions, invoices and receipts to be sent to this member by e-mail.

Adjust Subscription Purse balance (currently ....) without marking any subscription as paid:

This displays the current gross balance for the member, and offers the option to adjust the balance by recording a gross payment. Typically this may be useful when a member joins and you wish to set an initial opening balance. Note that if the VAT rate is non zero then the VAT amount will be calculated from the gross value entered. Do NOT use this to record a payment for a subscription. Instead use the Payment Recording wizard or record a single subscription payment

Note: That some of the above fields are set automatically when the Subscriptions Option is installed.

Notes Tab

Allows general information to be recorded about the Member.

User-defined Fields
In addition, three "user-defined fields" are available. These are three fields available for general data (up to 100 characters each) that could be used for any local purpose. Data held in these fields is reported on the Membership 'Notes' report, the 'User-defined Notes' report and also included in the output file created by the **Export** option.

You may change the title for each of the three fields to your own preferred names through Global Options.

See Also

- Add a new Member

- Modify a Member record

- [Delete a member (Mark as Past Member)](#)

- [Recover a previously deleted Member](#)

- [Change Away Member to Home Member](#)

- [Change Away Member's Home Club](#)

- [Change Home Member to an Away Member](#)

- [Basic Player Subscription recording and management](#)

6.2.6   Change Away Member to a Home Member

Only available when Handicapping is being done locally.

To change an Away member to a Home member

1.   Do one of the following:

   - In the Players list, select a Member and press **Enter** Key, or

   - In the Players list, select a Member, then on the **Players** menu, click **Edit Member**, or

   - On the **Players** menu, click **Edit Member** and select a Member from the list displayed.

2.   Click the **Handicapping** tab

3.   Under the **Players' Handicap:** section you will see that **Another Club - is 'Away' Player** is selected**.**

4.   Select "*Club Name*" **- ['Home' Player]**, where "*Club Name*" is the name of your club

5.   Click **OK**.

See Also

- [Add a new Member](#)

- [Modify a Member record](#)

- [Delete a member (Mark as Past Member)](#)

- [Recover a previously deleted Member](#)

- [Membership record fields](#)

- [Change Away Member's Home Club](#)

- [Change Home Member to an Away Member](#)

- [Basic Player Subscription recording and management](#)

6.2.7   Change Away Member's Home Club

Only available when Handicapping is being done locally.

To change an Away member's Home Club

1.   Do one of the following:

- In the Players list, select a Member and press **Enter** Key, or

- In the Players list, select a Member, then on the **Players** menu, click **Edit Member**, or

- On the **Players** menu, click **Edit Member** and select a Member from the list displayed.

2.   Click the **Handicapping** tab

3.   Under the **Players' Handicap:** section you will see that **Another Club - ['Away' Player]** is selected

.

4.   Click **Select Home Club** and select the new home club of the player

---

See Also

- Add a new Member

- Modify a Member record

- Delete a member (Mark as Past Member)

- Recover a previously deleted Member

- Membership record fields

- Change Away Member to Home Member

- Change Home Member to an Away Member

- Basic Player Subscription recording and management

6.2.8   Change Home Member to an Away Member

Only available when Handicapping is being done locally.

To change a Home member to Away member

1.   Do one of the following:

- In the Players list, select a Member and press **Enter** Key, or

- In the Players list, select a Member, then on the **Players** menu, click **Edit Member**, or

- On the **Players** menu, click **Edit Member** and select a Member from the list displayed.

2.   Click the **Handicapping** tab

3.   Under the **Players' Handicap:** section select **Another Club - ['Away' Player]**

4.   Click **Select Home Club** and then choose the appropriate Home Club

5.   Click **OK**.

See Also

- Add a new Member

- Modify a Member record

- Delete a member (Mark as Past Member)

- Recover a previously deleted Member

- Membership record fields

- Change Away Member to Home Member

- Change Away Member's Home Club

- Basic Player Subscription recording and management

6.2.9   Basic Player Subscription recording and management

When the Subscriptions Option is NOT installed then there are some basic subscription recording facilities included in HandicapMaster

Introduction

This facility allow a simple annual payment record to be maintained.

Three items may be recorded

- Subscription

- Locker Rent

- Other

In addition the method of payment can be recorded.

Add a New Payment method

- On the **Players** menu, click **Subscriptions** and click **Add**

- Enter the description and click **OK**

Edit an existing Payment Method

- On the **Players** menu, click **Subscriptions** and click once on one of the entries to highlight it.

- Click **Edit**

- Amend the description and click **OK**

Delete a Payment Method

- On the **Players** menu, click **Subscriptions** and click once on one of the entries to highlight it.

- Click **Delete**

- click **OK**

Note: If the payment method is allocated to one or more members then it cannot be deleted

Clearing Basic Subscription Payments

To delete all basic subscription payments do the following:

- On the **Players** menu, click **Subscriptions** and click Clear All Payments

- Confirm you wish to clear all payments

See Also

- Add a new Member

- Modify a Member record

- Delete a member (Mark as Past Member)

- Recover a previously deleted Member

- Membership record fields

- Change Away Member to Home Member

- Change Away Member's Home Club

- Change Home Member to an Away Member

6.3   Set a Handicap for a Member

Local Handicapping

Further details are provided in the section <u>allocate an initial handicap</u>

6.4 View a Member's Playing Record

A player's Playing Record is a record of Scores returned by that player at their club.

There are three ways to view a Playing Record. These are

- In tabular form,

- As a printable report, or

- As a graph.

To View a Member's Playing Record (Table format)

1.   Do one of the following:

- Click the **Records** button on the main Toolbar and select a Member from the list if displayed.

- In the Players list, select a Member, then on the **Reports** menu, click **Player Record**, then click **Playing Records**

- On the **Reports** menu, click **Player Record**, then click **Playing Records** and select a Member from the list if displayed.

To View a Member's Playing Record (Report format)

1.   Do one of the following:

- In the Players list, select a Member, then on the **Reports** menu, click **Player Record**, then click **View As Report**

- On the **Reports** menu, click **Player Record**, then click **View As Report** and select a Member from the list if displayed.

To View a Member's Playing Record (Graphical format)

1.   Do one of the following:

- In the Players list, select a Member, then on the **Reports** menu, click **Player Record**, then click **View As Graph**

- On the **Reports** menu, click **Player Record**, then click **View As Graph** and select a Member from the list if displayed.

To view the Handicap Records for a Past Member

1.   In the Past Members list, select a Player, then click with the Right Hand Mouse Button and select **Playing Records**.

6.5 Create a Handicap Certificate for a Member

May not be available in all regions due to regulatory restrictions.

To create a Handicap Certificate for a member

1. Do one of the following:

    - On the **Reports** menu, click **Player Handicap Certificate**.

    - Click the **Certificate** button on the main Toolbar.

2. If the Select a Player window is displayed, choose the applicable Member.

Notes:

- Handicap Certificates are only available for Home Club players.

See Also

- Add a Club Logo to Reports

6.6   Member Subscription Pools

6.6.1   Introduction

Member Subscription Pools are only available when the Subscriptions Option has been installed as a licenced option. If these are not available, then the Subscriptions Option may not be installed.

It is possible to place members in a Member Subscription Pools for subscription purposes. This pooling does not affect the handicapping aspects of members.

Pools may have a member or non-member as their contact for correspondence by printed letter or by e-mail.

Possible uses of pools are:

- Group a number of family members together so that the renewal letters are sent to one individual.

- Provide corporate membership where you wish to invoice a company for a number of members.

- Place a junior member in a pool with a non member contact (e.g. a parent or guardian) so the renewal letter is sent to the pool contact rather than the junior member.

Notes:

If the Pool Contact does not have an e-mail address then it is NOT possible to send subscriptions and invoices by e-mail to the members of the membership group, even if the individual members have e-mail addresses.

Contents

- Add a Group

- Edit a Group

- Add Members to a Group

- Remove Members from a Group

6.6.2   Add a New Pool

Member Subscription Pools are only available when the Subscriptions Option has been installed as a licenced option. If these are not available, then the Subscriptions Option may not be installed.

To add a new Member Subscription Pool to HandicapMaster

1.   On the **Accounting** menu, click **Member Subscription Pools**, then **New Pool**.

2.   Add the Member Subscription Pools using the Member Subscription Pools window.

6.6.3 Edit an Existing Pool

Member Subscription Pools are only available when the Subscriptions Option has been installed as a licenced option. If these are not available, then the Subscriptions Option may not be installed.

To edit an existing Member Subscription Pool

1. Do one of the following:

    - On the **Accounting** menu, click **Member Subscription Pools**, then **Edit Pool**. Select the Pool to edit and click **OK**.

    - In the Member Subscription Pools List, select the Pool to edit, Right-click and select **Edit Pool**.

2. Edit the Member Subscription Pool using the Member Subscription Pools window.

6.6.4 Member Subscription Pools Window

Member Subscription Pools are only available when the Subscriptions Option has been installed as a licenced option. If these are not available, then the Subscriptions Option may not be installed.

The Member Subscription Pools window allows you to create a new or edit existing Member Subscription Pool.

The Pool Contact is the person to whom subscription renewals for pool members are addressed and sent to.

The member Subscription Pools Window

In the **Pool Name** box enter the name to be given to the Member Subscription Pool..

In the **Pool Description** box you may enter a description for this Pool; this is optional.

Select Member or Other to assign a **Pool Contact**. A Pool Contact is the person to whom subscription correspondence is addressed.

- Select Member then click the **Change** button to select a member who is to be the Pool Contact.

- Select Other to specify a non member as the Pool contact. You may then enter the Title, First Name, Last Name e-mail address and the Address details for the Contact.

Notes:

- Where the Pool Contact is a member then subscription e-mails will ONLY be sent if that member has been selected to receive subscriptions and invoices by e-mail. You may select the members who have opted to receive subscriptions by e-mail on the Subscriptions Tab of the Edit Member facility.

- Select Other when you require a non member as a Pool Contact e.g. corporate membership contact, or a parent of a junior member.

- If Other is selected as the Pool Contact then if the E-mail address is filled in then this will be used if you send the subscriptions by e-mail. Leave this blank if you do NOT wish to send subscriptions by e-mail to the pool contact.

6.6.5 Add Members to a Pool

Member Subscription Pools Window are only available when the Subscriptions Option has been installed as a licenced option. If these are not available, then the Subscriptions Option may not be installed.

To add a member to a Member Subscription Pool

1. Do one of the following:

    *   In the Players list, select the Member and press **Enter Key**, or

    *   In the Players list, select the Member, then on the **Players** menu, click **Edit Member**, or

    *   On the **Players** menu, click **Edit Member** and select the Member from the list displayed.

2. In the **Subscription Pool** box, select the Pool to add this member to.

To add more than one member to a Member Subscription Pool

1. Do one of the following:

    *   On the **Accounting** menu, click **Member Subscription Pools**, then **Manage Pool Member**s. Select a Pool.

    *   In the Member Subscription Pools List, select the Pool and press the **Enter Key**.

2. Do one of the following:

    *   Press the Insert key and select the members to add to the Pool.

    *   Right-click and select **Add Member To Pool**.

3. Tick the box alongside those Members to be added to the Pool and click **OK**.

6.6.6 Remove Members from a Pool

Member Subscription Pools are only available when the Subscriptions Option has been installed as a licenced option. If these are not available, then the Subscriptions Option may not be installed.

To remove a member from a Member Subscription Pool

1. Do one of the following:

    *   On the **Players** menu, click **Edit Member** and select the Member from the list displayed. In the **Subscription Pool** box, select **Not In A Pool**.

    *   In the Member Subscription Pools List, select the Pool and press the Enter Key. Select the Member to be deleted and press the Delete key.

To remove all members from a Member Subscription Pool

1. Do one of the following:

- On the **Accounting** menu, click **Member Subscription Pool**, then **Manage Pool Members**. Select a Pool.

- In the Member Subscription Pools List, select the Pool and press the `Enter` Key.

2.   Right-click and select **Remove ALL Members From Pool**.

6.7 Importing or Exporting Membership records

6.7.1 About Importing and Exporting

Importing

Membership records may be added from an external file in one operation using the Import facility. In addition, handicaps for existing members within the HandicapMaster database may be updated.

If the membership record does not currently exist, a record is added to the database and a Handicap Brought Forward entry is made in the Member's handicap record.

If the membership record already exists, then the Membership record details (such as Address Fields, etc.) are updated. Then the current actual handicap is checked. Should this differ to that currently recorded in the HandicapMaster database, a CORRECTION entry is added to the Member's handicap record, adjusting the Handicap for this member.

Importing from a Spreadsheet

When importing from spreadsheets it is essential to enter your records precisely. HandicapMaster will reject any characters or even spaces that do not exactly match the records in the database.

Reasons for rejecting data include:

- an extra space in the column header, or within the column
- golf club names not entered exactly as in the HandicapMaster list of Golf Clubs. For example, if you entered St Andrews Major and included commas or apostrophes HandicapMaster will reject it.
- required fields left blank.
- Duplicate PIN numbers, each entry must have a unique PIN Number.

HandicapMaster will tell you which column or record is rejected.

Before continuing it is helpful to write down the rejected fields. HandicapMaster informs you the number of the relevant record. This is one more than the number of the row on the spreadsheet since the column header occupies row number one.

How HandicapMaster identifies whether a membership record already exists

HandicapMaster will attempt to match up the name of the Member with any entry held in the database. The name is defined as the "First Name + Middle Initials + Surname + Home Club".

If importing players using a central handicapping service and only the National ID is being imported, the National ID is used to match with an existing entry.

Exporting

Membership records that are currently held within the HandicapMaster database can be exported to an external file in one operation using the Export facility.

The external file will be created in a 'Comma-separated file', suitable for importing into Microsoft Word or Excel.

6.7.2   Import Memberships from an external file

To import membership records

1.   Using an external product such as Microsoft Excel, create an import file conforming to the required layout.

2.   On the **Players** Menu, click **Import**.

3.   In the Import window, enter the full file name and location in the **Location and name of Import File** box (or click the **Browse** button to locate a file)

4.   Tick the **Update Existing Membership Records** option if you wish to import changes to existing membership records. The default is for this to be un-ticked to prevent accidental updating of existing membership records.

6.   Click the **Import** button.

Notes:

- To import a member who does not have a handicap, enter the HANDICAP field as a non-numeric string of letters or leave blank.

- If the import file contains entries with the *exact* same member names and home club only a single membership record will be created.

- You will need to tick the **Update Existing Membership Records box** in order to change any existing membership records.

- It is NOT possible to change the home club of an existing entry via the import facility as players need to have a unique name and home club.

See Also

- Import Visitors from an external file

6.7.3   Import Visitors from an external file

To import 'Visitors' (Non-Members) into HandicapMaster

Follow Import Memberships from an external file, ensuring

1.   The HOME/AWAY/VISITOR column must be present and set to a value of "V".

2.   The HOME CLUB column must be present (with the Home Club for this Visitor).

3.   The Handicap column must be present, unless connected to a handicapping service which allows player lookup using the NATIONAL ID. If the players' current exact handicap is not known, enter their current Strokes Received.

When importing only Visitors, the following columns are required, unless using the handicapping service (see below). All other columns are optional.

- SURNAME

- MIDDLE INITIALS

- FIRST NAME

- GENDER

- CURRENT EXACT HANDICAP

- HOME/AWAY/VISITOR (must be set to V)

- HOME CLUB

Notes:

- If a Visitor PIN range has been allocated then do NOT import PIN values when importing visitors as any visitors with PIN values outside the range will be rejected by the import.

- If HandicapMaster is integrated with an external membership system then only visitors may be imported. Any non visitor entries in the import file are ignored.

To import Visitors using a central handicapping service

Not available with Local Handicapping.

The import file may contain just the NATIONAL ID column. Player details are retrieved from the handicapping service.

In this case, HandicapMaster prompts to determine whether new players are added as Visitors or Members.

Note: It is not possible to import "Out of Region" players using this method.

6.7.4   Export Membership Records to an external file

To export membership records

1.   On the **Players** menu, click **Export**.

2.   In the Export Window, enter the full file name and location of the file to be created in the **Location and name of Export file** box (or click the **Browse** button to select a file name).

3.   Select the required set of membership records from the **Export records for the following categories of members** list.

4.   Click the **Export** button.

Notes:

- The number of membership records that will be exported for each specific category of member is displayed in brackets alongside the entry in the list.

- A file in the Export format will be created

- Past Member details may be exported to be used with an external "mail merge" facility to send correspondence to past Members.

- If you are exporting records to be read by a spreadsheet program such as Excel, you may

  change the way 'Plus' Handicaps are exported, so the "+" prefix shows up in Excel.

To export personal data for a current or past member to meet General Data Protection Regulation (GDPR) "Right of data portability"

1. On the **Players** menu, click **Export GDPR Data**.

2. Select the member or past member from the supplied list. Click **OK**.

3. Choose the location and name for the file to be created. Click **Save**.

6.7.5 Format of the Import File

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Required format of the Import File

</div>

The file must be a "Comma-Separated File" which is typically suffixed .CSV. This format can, for example, be saved from a spreadsheet in Microsoft Excel.

- The file must be an ASCII text file,

- There must be one membership record per line in the file, records may NOT span multiple lines.

- There must be a special 'Header' record as the first record in the file (see below).

- Each field within each record must be separated by a comma.

- Unsupported fields will be ignored.

NOTES:

- Some of the fields have different uses or may not be required depending on the handicapping system in use.

- Accounting fields may only be imported if the [HandicapMaster Userid](#) has update access to 'Accounting'.

- For Date fields such as **Date of Birth**: We recommend using a 4 digit year format as using a 2 digit year format can prevent dates being imported depending on your computer settings. If using spreadsheet software be aware that some products display a 2 digit year as a 4 digit year but retain the 2 digit format i the data.

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The Header Record

</div>

The first record in the file must be a Header record. This consists of the names of each of the columns (fields) within the file. Not all the columns are required. The minimum required are 'Surname', 'First Name' and 'Middle Initials', which must be unique.

The fields supported are as follows:

Surname
Member's Surname
This field is required

Middle Initials
Member's Middle Initials

First Name (or Given Name)
Member's Given Name
This field is required

Gender (or Sex)
The gender of the member expressed as 'M' or 'Male' for Male or 'F' or 'Female' for Female.
Alternatively, if this field is missing, the CATEGORY of the member must include the text "Gent" or

"Lady".
Default: Male.

Age Group
This is the age group into which the member should be assigned. If this field is not set then the import facility will use the Date of Birth value for the member and assign an appropriate Age Group to the member.
If this value is set it will override the value calculated from the Data of Birth field.
Default: Adult.

Possible values are:

• For Juniors: 'JUNIOR, 'Junior', 'J' or 'j'

• For Adults: 'ADULT', 'Adult', 'A' or 'a'

• For Seniors: 'SENIOR'. 'Senior', 'S' or 's'

• For User-defined Age Group 1: "OTHER1", "Other1", "1" or Age Group Description

• For User-defined Age Group 2: "OTHER2", "Other2", "2" or Age Group Description

Two of the Age Groups provided may be renamed using Options.

Handicap
(**Exact Handicap**, **Handicap**, or **Current Exact Handicap** are retained for backward compatibility)

The current Handicap for the member.

NOTE: Only available when Handicapping is being done locally.

Default: No Handicap.

Home/Away/Visitor
Whether the member has this club as their Home Club ('H' or 'Home') or this is an Away club for them ('A' or 'Away'). If this player is a Visitor (I.e. a Non-member), use 'V' or 'Visitor' and see considerations below.
Default: Home Club Member.

Home Club
The name of the players' Home Club. The club name must already be known to the HandicapMaster database. Note: This column is ignored if the membership 'HOME/AWAY/ VISITOR' column is Home.

Out of Region
When connected to a central handicapping service, set to 'Y' or 'Yes' if the imported player's handicap is managed outside the handicapping service (e.g. another national system).

PIN
Player's PIN number, used for keypad only competition score entry.
Default: Lowest value unused 3 to 6 digit number.
Note: if Visitor PIN's are enabled then when importing you may be prompted that a value is not valid for the member or visitor being imported. You may then either continue the import or cancel it.

Title
The Title of the member, expressed as one of the recognised abbreviations accepted by HandicapMaster. These are "Mr", "Mrs", "Miss", "Master", "Ms", "Dr", "Sir", "Lady", "Lord", "Rt.Hon" or "H.R.H"

Default: No title.

Address Line 1 (or Address 1)
The first line of the Member's address

Address Line 2 (or Address 2)
The second line of the Member's address

Address Line 3 (or Address 3)
The third line of the Member's address

Address Line 4 (or Address 4)
The fourth line of the Member's address

Postcode (or Post Code, or Address 5)
The Post Code of the Member's address

Home Phone (or Telephone 1)
The Member's first telephone number

Mobile Phone (or Telephone 2)
The Member's second telephone number

FAX (or Telephone 3)
The Member's third telephone number

E-Mail Address
The Member's e-mail address
Note if an e-mail address is supplied that is invalid an prompt to import this member without the
e-mail address is displayed. Or the import may be cancelled.

Membership No (or Club Number)
The Membership number or code for this member
Default: No Membership Number or Code.

Category
The Membership category to which the member belongs to.
Default: Category of "Unknown".

Officer Title
The Position on the Committee held by this Member.
Default: Not on Committee..

Date Joined
The date the Member joined

Date Renewed
The date the Member last renewed his or her membership. Not applicable if Subscriptions Option
installed.

Date Expires
The date the Member's current membership expires. Not applicable if Subscriptions Option
installed.

Date Subscription Paid

The date when the member paid their subscription s. Not applicable if Subscriptions Option installed.

Method Of Subscription Payment
A note of how the member paid their fees. Not applicable if Subscriptions Option installed.

Amount Subscription Paid
The amount of money paid when settling subscription fees. Not applicable if Subscriptions Option installed.

Amount Locker Rent Paid
The amount of money paid when settling Locker Rent fees. Not applicable if Subscriptions Option installed.

Amount Other Paid
The amount of money paid when settling other subscription fees. Not applicable if Subscriptions Option installed.

National ID (or "National Number" or "Golfnet Number")
The player's national ID if they are a member of a Golfing Union WHS service. 8 digits for player's in Ireland and 10 digits for players in England, Scotland or Wales. Other regions may have alpha numeric ID's.

Card Number
The player's membership card number. This matches field 'Has Other Membership Card' in membership record.

Date of Birth (or DOB)
Member's Date of Birth.

Locker Number (or Locker No)
The Member's Locker Number.

Default Payment Method
This defines the default method of payment that is used to record this member's subscriptions.
Note this is only used if the HandicapMaster Subscriptions Option is installed.
Default: No Payment Method

Send Invoice By
This defines if Subscriptions should be sent by Letter or E-mail to this member.
Note this is only used if the HandicapMaster Subscriptions Option is installed.

Possible values are:

- For Letters: 'L' or 'LETTER'

- For E-mail: 'E', 'EM', 'EMAIL' or 'E-MAIL'

Default: Letter.

Balance Adjustment
This will allow an initial balance to be set of a new member, or record an adjustment to an existing member's account balance. E.g. If an existing member has an account balance of 100 then a balance adjustment of 50 will result in a balance of 150.
Note this is only used if the HandicapMaster Subscriptions Option is installed.
Default: No balance adjustment

Negative adjustments are possible.

The value is the GROSS adjustment, and if the VAT rate is non-zero the Net and VAT amounts will be calculated.

Purse2 (or Purse2 Adjustment)
This will allow an initial competition fee purse balance to be set of a new member, or record an adjustment to an existing member's competition fee purse balance. E.g. If an existing member has a competition fee purse balance of 10 then a balance adjustment of 25 will result in a balance of 35.
Note this is only used if the HandicapMaster Subscriptions Option is installed.
Default: No adjustment

Negative adjustments are possible.

The value is the GROSS adjustment.

Account Notes

The accounting notes (if any) associated with the member.

IMPORTANT the following limitations apply.

- The maximum size of the account notes text is limited to 4096 characters.

- The 'Account Notes' text must be a string of text without any linefeed's or new line characters. I.e. a string of text enclosed in double quotes and be part of the same line as the other fields.

Note this is only used if the HandicapMaster Subscriptions Option is installed.

DD ACCOUNT NAME

The name of the members bank account for direct debit payments.Maximumn of 20 characters
Note this is only used if the HandicapMaster Subscriptions Option is installed.
Default: blank value

DD ACCOUNT NUMBER

The number of the members bank account for direct debit payments. Maximumn of 8 digits.
Note this is only used if the HandicapMaster Subscriptions Option is installed.
Default: 0

DD SORT CODE

The sort code of the members bank account for direct debit payments. Format is either sequence of 6 digits or paris of digits separated with a dash e.g 11-22-33.
Note this is only used if the HandicapMaster Subscriptions Option is installed.
Default: blank value

DD REFERENCE

The member's direct debit reference for direct debit payments. Maximumn of 18 characters..
Note this is only used if the HandicapMaster Subscriptions Option is installed.
Default: blank value

DD NEW INSTRUCTION SET UP

Indicates that the member's direct debit has had an initial instruction set up confirmed by your bank.
Either Yes or No or Y or N
Note this is only used if the HandicapMaster Subscriptions Option is installed.
Default: No

Electronic Communication Consent

Indicates if member has consented to electronic communication.
Either Yes or No or Y or N

Parental Consent
Indicates if Parental Consent was given (if required)
Either Yes or No or Y or N

Data Protection Notes
Notes (if any) related to Data protection of the member.

IMPORTANT the following limitations apply.

- The maximum size of the notes text is limited to 4096 characters.

- The 'Notes' text must be a string of text without any linefeed's or new line characters. I.e. a string of text enclosed in double quotes and be part of the same line as the other fields.

Notes
The membership notes (if any) associated with the member.

IMPORTANT the following limitations apply.

- The maximum size of the notes text is limited to 4096 characters.

- The 'Notes' text must be a string of text without any linefeed's or new line characters. I.e. a string of text enclosed in double quotes and be part of the same line as the other fields.

User1, User2, User3
Values for the three User-defined fields in the membership records. If the columns have been renamed through Global Options, then the names of the fields may also be used.

Account ID (or Contact ID)
This is the unique identifier that links the membership details between the external system and HandicapMaster.
Note: This field is only applicable when there is an external membership system.
This field will only apply for Gold and is only imported when the import is run as an ADMIN user.
Default value is " "

The fields in the header record must be spelt exactly as in the table above in order to be recognised.

It is necessary for the GIVEN NAME and SURNAME fields to be included, as a minimum. The remainder of the fields are optional.
The fields must follow the order of the header record, but items within the header record can be in any order.

Including a Comma in the data to import

If the data to be imported in to HandicapMaster includes a comma itself, the field should be enclosed in double quotes. For example, to import an address field with a comma, the field should be entered as

"1 High Street,"

This is how Microsoft Excel will export any data containing a comma when a spreadsheet is saved in "Comma-separated File" format.

To clear a date field in an existing Membership Record

If you wish to clear a date field (such as Date Subscriptions Paid, etc.) use the word CLEAR in the date column in the import file. HandicapMaster will clear the date from the existing membership record.

CLEAR may also be used to remove a previous **Title** field value from an existing member record or a **National ID** field value.

CLEAR may also be used to remove a previous **E-mail Address** value from an existing member record..

6.7.6   Format of the Export File

Format of the Export File

The export file will be:

- an ASCII text file,

- one membership record per record in the file,

- a special 'Header' record will be the first record in the file (see below).

- each field within each record will be separated by a comma.

NOTES:

- Some of the fields have different uses or may not be required depending on the handicapping system in use.

- Accounting fields may only be exported if the HandicapMaster Userid has view or update access to 'Accounting'.

- Group Booking Organiser fields may only be exported if the HandicapMaster Userid has view or update access to 'Bookings (Groups)'.

The Header Record

The first record in the file will be a Header record. This consists of the names of each of the columns (fields) within the file.

The fields will be ordered as follows (different fields apply when exporting Group Bookings Organisers):

Surname
Member's Surname

Middle Initials
Member's Middle Initials

First Name
Member's Given Name

Gender
The gender of the member expressed as a single character of 'M' for Male or 'F' for Female. Alternatively, if this field is missing, the CATEGORY of the member must include the text "Gent" or "Lady"

Age Group

The age group to which the member is assigned.

Current Exact Handicap
The current actual (exact) handicap for the member

Current Strokes Received
The current Strokes Received for the member

Home/Away/Visitor
Whether the member has this club as their Home Club ('H') or this is an Away club for them ('A'). If this player is a Visitor (I.e. a Non-member), "V" is used.

Home Club
The name of the players' Home Club. The club name must already be known to the HandicapMaster database.

PIN
Player's PIN number, used for keypad only competition score entry.

Title
The Title of the member, expressed as one of the recognised abbreviations accepted by HandicapMaster. These are "Mr", "Mrs", "Miss", "Master", "Ms", "Dr", "Sir", "Lady", "Lord", "Rt.Hon" or "H.R.H"

Address 1
The first line of the Member's address

Address 2
The second line of the Member's address

Address 3
The third line of the Member's address

Address 4
The fourth line of the Member's address.

Address 5
The Post Code of the Member's address.

Telephone 1
The Member's first telephone number.

Telephone 2
The Member's second telephone number.

Telephone 3
The Member's third telephone number.

E-Mail Address
The Member's e-mail address.

Club Number
The Membership number or code for this member.

Category
The Membership category to which the member belongs to.

Officer Title
The Position on Committee currently identified for this member.

Date Joined
The date the Member joined .

Date Renewed
The date the Member last renewed his or her membership.

Date Expires
The date the Member's current membership expires.

Date Subscription Paid
The date when the member paid their subscription fees.

Method Of Subscription Payment
A note of how the member paid their fees.

Amount Subscription Paid
The amount of money paid when settling subscription fees

Amount Locker Rent Paid
The amount of money paid when settling Locker Rent fees.

Amount Other Paid
The amount of money paid when settling other subscription fees.

National ID
The player's national ID if they are a member of the Golf Ireland, England Golf', Scottish Golf' or Wales Golf WHS ™ Platform. 8 digits for player's in Ireland and 10 digits for players in England, Scotland and Wales. Other regions may have alpha numeric ID's.

Card Number
The player's membership card number. This matches field 'Has Other Membership Card' in membership record.

Date of Birth
Member's Date of Birth.

Locker Number
The Member's Locker Number.

Default Payment Method
The default method of payment that is used to record this member's subscription payments.
Note this is only used if the HandicapMaster Subscriptions Option is installed.

Subscription Template
The name of the subscription template assigned to this member.
Note this is only used if the HandicapMaster Subscriptions Option is installed.

Account Balance
The amount of money in the members Subscription account.
Note this is only used if the HandicapMaster Subscriptions Option is installed.

Account Notes
The Accounting notes (if any) associated with the member. Note: that notes have any new lines converted to spaces to ensure one line in the export file per member.
Note this is only used if the HandicapMaster Subscriptions Option is installed.

Send Invoice By
This defines if Subscriptions should be sent by Letter or E-mail to this member.
Note this is only used if the HandicapMaster Subscriptions Option is installed.

Competition Fee Purse
The amount of money in the members Competition Fee account..
Note this is only used if the HandicapMaster Subscriptions Option is installed.

DD ACCOUNT NAME

The name of the members bank account for direct debit payments.Maximumn of 20 characters
Note this is only used if the HandicapMaster Subscriptions Option is installed.

DD ACCOUNT NUMBER

The number of the members bank account for direct debit payments. Maximumn of 8 digits.
Note this is only used if the HandicapMaster Subscriptions Option is installed.

DD SORT CODE

The sort code of the members bank account for direct debit payments. Format is either sequence
of 6 digits or paris of digits separated with a dash e.g 11-22-33.
Note this is only used if the HandicapMaster Subscriptions Option is installed.

DD REFERENCE
The member's direct debit reference for direct debit payments. Maximumn of 18 characters..
Note this is only used if the HandicapMaster Subscriptions Option is installed.

DD NEW INSTRUCTION SET UP
Indicates that the member's direct debit has had an initial instruction set up confirmed by your
bank.
Values are Yes or No
Note this is only used if the HandicapMaster Subscriptions Option is installed.

Notes
The membership notes (if any) associated with the member. Note: that notes have any new lines
converted to spaces to ensure one line in the export file per member.

Electronic Communication Consent
Indicates if member has consented to electronic communication.
Values are Yes or No

Date Communication Consent Changed
Date of the most recent change of Electronic Communication Consent

Parental Consent
Indicates if Parental Consent was given (if required)
Values is Yes if parental Consent given else blank.

Data Protection Notes
Notes related to Data protection. Note: that notes have any new lines converted to spaces to
ensure one line in the export file per member.

Date Deleted
When exporting 'Past members' this field will be included in the export file with the date the
member was deleted.

User1, User2, User3
Values for the three User-defined fields in the membership records. If the columns have been
renamed through Global Options, then the names of the fields will be used.

Account ID
This is the unique identifier that links the membership details between the external system and
HandicapMaster.
Note: This field is only applicable when there is an external membership system.
This field will only appear for Gold and is only exported when the export is run as the ADMIN user.

6.8 Change a Member to a Visitor

To change a Member to a Visitor

1. On the Left Hand Task Pane, select **Players** place

2. Select **All Members**

3. Select the Member to be changed then right-click.

4. On the pop-up menu, select **Change Member to Visitor**.

6.9 Change a Member to 'No Handicap'

May not be available in all regions due to regulatory restrictions.

To change a Member to 'No Handicap' (Eg. change from playing to social membership)

1. On the Left Hand Task Pane, select **Players** place

2. Select **All Members**

3. Select the Member to be changed then right-click.

4. On the pop-up menu, select **Change Member to 'No Handicap'**.

6.10   Synchronise with External Membership System

HandicapMaster includes an option to load and maintain Membership information from an external source, via a Comma-separated Values (CSV) file or by processing "Remote Requests" via a program interface ("API"). In this situation, membership information in HandicapMaster becomes read-only.

This option is configured through an Administrator-only option. See Integrate HandicapMaster with Other Systems for more information.

Notes:

- This option is only available in the Gold editions of HandicapMaster

Chapter 7

Maintaining Visitor Records

7 Maintaining Visitor Records

7.1 About Visitors

Visitors are Players who may play in the competitions, but who are not members of the Club or Society.

Contents
• Add a new Visitor
• Modify a Visitor record
• Delete a Visitor record
• Recover a previously deleted Visitor
• Visitor Membership record fields
• Update a handicap of a Visitor
• Change a Visitor to a Member

7.2   Add a new Visitor

There are four ways to add a Visitor to the database:

To add a new Visitor to HandicapMaster

New Visitor menu option

1. On the **Players** menu, click **New Visitor**.

2. Enter the Player's name in the **Last Name**, **Middle Initials** and **First Name** fields.

3. Optionally, enter a **Title** for the player.

4. Select the **Gender** and **Age Group** of the player. Two of the Age Groups provided may be renamed using Options.

5. Click **Choose Home Club** to select the appropriate Home Club for the Visitor

6. In the **Handicap** box, enter the Visitor's current Handicap.

7. Tick the **Has National ID** box if the Visitor has a number on a national Handicapping Service.

8. The **Look Up Players Details** button is made available to users of the some editions, which may be used to gather details of Visitors from available national systems (see Tip below).

9. Do one of the following

   - Click **Save and More** if you have further Visitors to add to the database, or

   - Click **OK** to save this Visitor record

Tip

If HandicapMaster is linked to a handicapping service which allows it, you may receive the Visitor details from the Handicapping Service by entering the Visitor's national ID in the **National ID** box and clicking **Look Up Players Details** button. You will need at active Internet connection to use this facility.

You may enter other Membership Information using the visitor membership record fields provided.

To add a Visitor using the Player Entry system

If HandicapMaster is linked to a handicapping service which allows it, Player Entry will automatically add a new Visitor to the HandicapMaster database using data from the handicapping service when a Visitor types their National ID or swipes a magnetic card with their National ID on it.

To add more than one Visitor in one action

You may add one or more Visitors based upon a list of player details included in an external file.

Import from an external File (where you have player's names and details)

- See Importing and Exporting Membership Records, where Visitor records may be added in bulk from a file containing names and player details.

Notes:

PIN numbers for Visitors are allocated automatically. It is possible to select one of a number of pre-defined ranges for Visitor PIN numbers.

See also

- Modify a Visitor record

- Delete a Visitor record

- Recover a previously deleted Visitor

- Visitor Membership record fields

- Update a handicap of a Visitor

- Change a Visitor to a Member

7.3 Modify a Visitor record

To modify the details of an existing Visitor record

1. Do one of the following:

   - In the Visitors list, select a Visitor and press ENTER Key, or

   - In the Visitors list, select a Visitor, then on the **Players** menu, click **Edit Visitor**, or

   - On the Players menu, click **Edit Visitor** and select a player from the list displayed.

2. Modify the Visitor record using the visitor membership record fields provided.

To modify the details of a Past Visitor

1. Do one of the following:

   - In the Past Members list, select a Visitor and press ENTER Key,

   - In the Past Members list, select a Visitor right click and select **Edit** from the popup menu.

   - In the Past Members list, select a Visitor right then select **Edit a Membership record** from the Previous Member Tasks

2. Modify the Visitor record using the visitor membership record fields provided.

Notes:

- When viewing and editing Past Visitor records a reduced range of information is available.

See also

- Add a new Visitor
- Delete a Visitor record
- Recover a previously deleted Visitor
- Visitor Membership record fields
- Update a handicap of a Visitor
- Change a Visitor to a Member

7.4   Delete a Visitor record

To delete a Visitor

1.   Do one of the following:

- In the Visitors list, select a Visitor and press DELETE Key, or

- In the Visitors list, select a Visitor, then on the **Players** menu, click **Delete Visitor**, or

- On the Players menu, click **Delete Visitor** and select a Visitor from the list displayed, o

- In the Visitors list, right click and select **Delete** from the pop-up menu.

To delete multiple Visitors

1. In the Visitors list, right-click and select **Delete Multiple Visitors**.

2. Tick the box along side those visitors to be deleted

3. Click **OK** and confirm the deletion.

To delete ALL Visitor records

1. In the Visitors list, right-click and select **Delete Multiple Visitors**.

2. Click **Select All**.

3. Click **OK** and confirm the deletion.

To delete all Visitor records for players without any recent scores recorded in the system

1. Do one of the following:

- In the Visitors Task list, select **Delete Visitors with no recent Scores**.

- In the Visitors list, right-click and select **Delete Visitors with no recent Scores**.

2. Enter a **date**. Click **OK**.

All visitors without one or more scores recorded in the system after this date (and who are not listed on any current Start Sheet and do not have any future bookings) will be moved to the 'Past Members' list.

Notes:

- It should be noted that when you delete a Visitor using this option, the record is not removed from the system. Rather it is marked as 'deleted', although the information is still held within HandicapMaster. By choosing the 'Past Members' folder (click **Show Folders** button if Tasks are currently displayed), all of the deleted membership records are displayed.

See also

- Add a new Visitor

- Modify a Visitor record

- Recover a previously deleted Visitor

- [Visitor Membership record fields](#)
- [Update a handicap of a Visitor](#)
- [Change a Visitor to a Member](#)

7.5 Recover a previously deleted Visitor

A Visitor record may be recovered and returned to current status, allowing that Visitor to enter further competitions.

To recover a previously deleted Visitor record

1. On the **Players** menu, click **Undelete**.

2. Choose a Member or Visitor to recover.

See also

- Add a new Visitor

- Modify a Visitor record

- Delete a Visitor record

- Visitor Membership record fields

- Update a handicap of a Visitor

- Change a Visitor to a Member

7.6   Visitor Membership record fields

The following information may be recorded for each visitor (Fields shown in red are compulsory fields).

<div style="border:1px solid blue; background:#dbe9f8;">

Details Tab

</div>

Last name
The member's Surname (last name).

First Name
The member's Given name (sometimes known as Christian name).

Middle Initials
The initials of the member.

Title
The title of the member.

Gender
Whether the member is Male or Female.

Date of Birth
If checked, identifies the members' Date of Birth.
To enter a Date of Birth, tick the box and then update the date. The date fields may be over typed, or click Day, Month or Year and and use the spin buttons.

Age Group
Identifies the age group of the member.
If a Date of Birth is provided for the member then the Age Group will be pre-selected. It can be changed if required. Available values are Junior, Adult, Senior or two 'others'. The 'Others' Age Groups may be renamed using Options.

Home Club

Click **Choose Home Club** and select the Visitor's home club

Handicap

Enter the player's Handicap.

Player Identification Number (PIN)
A three to six digit number that players may use to enter their competition scores. Randomly generated number that can be overridden, but must be unique for each player. By default, number will be 4 Digits in length.

National ID (if applicable)
The Member Number for the national Handicapping Service.

Tip: If HandicapMaster is linked to a handicapping service which allows it, click **Look Up Player Details** to fill in player details from the Handicapping Service.

<div style="border:1px solid blue; background:#dbe9f8;">

Contact Details Tab

</div>

Address, Town, County, Postcode.
The address of the member. Used when producing letters to be addressed to the member.

Telephone:
The telephone number of the member. Documentary only.

Mobile:
The mobile telephone number of the member. Documentary only.

E-mail:
The E-mail address of the member.

Data Protection

Use this section to record information related to management of personal data and General Data Protection Regulation (GDPR)

Consent given to receive Electronic communication

Tick this option if your organisation's procedure to request opt in to electronic communication such as e-mail has been obtained from the member.

IMPORTANT NOTE: If this option is NOT ticked then e-mails will NOT be sent to the member even if an e-mail address is recorded.

Parent/Guardian Consent obtained (if required)

Tick if required. Documentary only.

Note: the General Data Protection Regulation documentation indicates that the age of consent for a Child can range from 13 to 16 depending on the location. This age range may not match your age for Junior's

Data Protection Notes

You can record any notes related to Data protection if required.

Notes Tab

Allows general information to be recorded about the Member.

User-defined Fields
In addition, three "user-defined fields" are available. These are three fields available for general data (up to 100 characters each) that could be used for any local purpose. Data held in these fields is reported on the Membership 'Notes' report, the 'User-defined Notes' report and also included in the output file created by the **Export** option.

You may change the title for each of the three fields to your own preferred names through Global Options.

See also

- Add a new Visitor

- Modify a Visitor record

- Delete a Visitor record

- Recover a previously deleted Visitor

- Update a handicap of a Visitor

- Change a Visitor to a Member

7.7 Update a Handicap of a Visitor

To update the Handicap of a Visitor

1. <u>Modify the Visitor</u> record.

2. In the **Handicap** box, enter the revised Handicap value.

3. Click **OK**.

See also

- <u>Add a new Visitor</u>

- <u>Modify a Visitor record</u>

- <u>Delete a Visitor record</u>

- <u>Recover a previously deleted Visitor</u>

- <u>Visitor Membership record fields</u>

- <u>Change a Visitor to a Member</u>

7.8   Change a Visitor to a Member

To change a Visitor to a Member

1.   On the Left Hand Task Pane, select **Players** place

2.   Select **Visitors**

3.   Select the Visitor to be changed then right-click.

4.   On the pop-up menu, select **Change Visitor to Member**.

Notes:

The facility is not available when Linking to Other Membership systems

See also

- Add a new Visitor

- Modify a Visitor record

- Delete a Visitor record

- Recover a previously deleted Visitor

- Visitor Membership record fields

- Update a handicap of a Visitor

Chapter 8

Working with E-mail and Letters

8   Working with E-mail and Letters

8.1   Introduction

HandicapMaster may be used to communicate with members, clubs and other recipients using e-mail and letters.

This chapter describes these types of communication and the use of distribution lists.

Note

To be able to send e-mails directly from HandicapMaster, there are minimum requirements.

Contents

- Working with E-mail
- Writing Letters to Members
- Distribution Lists

8.2   Working with E-mail

8.2.1   E-mail Introduction

Using E-mail to send information from HandicapMaster.

This chapter deals with how to set-up HandicapMaster to be able to send reports, Letters, etc, by e-mail directly from HandicapMaster.

Do one of the following to send an e-mail

- On the **File** menu, select **E-mail**

- Use Shortcut keys CTRL + M together

When configured, reports may be sent easily by clicking the E-mail button on the Reports Toolbar. Reports are automatically added to the e-mail as PDF attachments.

To assist with the managing of sending e-mails a Distribution Lists feature is available.

The HandicapMaster E-mail service

The HandicapMaster E-mail service is a service for to customers with a valid registration for HandicapMaster.

This replaces the need to use an Internet Service Provider (ISP) or third party e-mail service to send e-mails and allows for a quick and simple set up to allow the sending of e-mail from within HandicapMaster.

Before using this service please review the HandicapMaster E-mail Service Terms of Service.

System requirements for sending e-mail from HandicapMaster

To be able to send e-mails directly from HandicapMaster, you will need

- Windows 7, Windows 8 or Windows 10.

- An e-mail account with an SMTP Server for outgoing e-mail, or use the HandicapMaster E-mail service.

Note: Some ISP's limit the number of e-mails that may be sent in one session.

Contents

- Configuring HandicapMaster to send E-mails

- The New Message and Recipients Windows

- View E-mail Result Log

- Change the covering text created in the body of an e-mail for selected reports

- Change the 'From' e-mail address used

- Emailing ...

    - Handicap Certificates to Members

    - Subscriptions

    - Overdue Subscriptions

- Letters

- Reports

- Members, Away Members and Visitors

- Past Members or Past Visitors

- Golf Clubs

- HandicapMaster E-mail Service Terms of Service

- HandicapMaster E-mail Service Quota

- HandicapMaster E-mail Service Rejections

8.2.2   Configuring HandicapMaster to send E-mails

Before you can send e-mail messages in HandicapMaster, you must first configure how HandicapMaster will send e-mails.

A separate e-mail configuration is stored for each HandicapMaster Userid.

To configure e-mail settings in HandicapMaster

If you have not previously entered any e-mail settings into HandicapMaster, then the *Configure E-mail Settings wizard* will be displayed, otherwise the existing settings will be shown.

1. Select one of the following:

   - **Using e-mail service built into HandicapMaster**, or

   - **Using my own E-mail service provider**, or

   - **Manually configure E-mail Settings**

If you selected *Using e-mail service built into HandicapMaster*, do the following:

2. Agree the Terms of Service for the inbuilt HandicapMaster e-mail service. Click **Next**.

3. In the **Your E-mail Address** box, type the e-mail address that you wish to receive any replies to your e-mails to be returned to (i.e. if the recipient of an email from you click *Reply* and returns an email to you). Make sure to include your user name, the @ symbol, and the domain name, for example "john@email.com". Click **Next**, then **Finish**.

If you selected *Using my own E-mail provider*, do the following:

2. Choose your Internet Service Provider from the list and click **Next**.

3. In the **Display Name** box, type your name as you want it to appear to other people (E.g. "John Smith" or "Example Golf Club") and click **Next**.

4. In the **E-mail Address** box, type the complete e-mail address assigned by your mail administrator or ISP. Make sure to include your user name, the @ symbol, and the domain name, for example "john@email.com", and click **Next**.

5. In the *Your Credentials* section, enter the **username/address** and **password** provided by your Internet Service Provider. You may tick the **Show Password** box to show the password as you

enter it.

6. Complete the wizard. You will be taken to the E-mail Settings section where you can confirm the settings and use the **Test Account ...** button to test the settings that you have entered.

If you selected *Manually configure E-mail Settings*, do the following:

2. In the **Your Name** box, type your name as you want it to appear to other people (E.g. "John Smith" or "Example Golf Club").

3. In the **Your E-mail Address** box, type the complete e-mail address assigned by your mail administrator or ISP. Make sure to include your user name, the @ symbol, and the domain name, for example "john@email.com"

4. In the **Mail Server** box, type the full name of the server provided by your ISP or mail administrator. Often this is *mail.* followed by your domain name, for example, mail.myISP.com. (see below).

5. In the **SMTP Port** box enter the number for the SMTP service.

6. Tick **This server requires an encrypted connection (TLS)** box if this is applicable for your e-mail service provider.

7. Tick **My outgoing Mail server requires Authentication** box and set a Username and Password if your ISP instructs you to do this.

8. Click **Test Account ...** button. This will send an e-mail to the e-mail address in "Your E-mail Address" to verify that the settings are correct and working.

9. Un-tick **Format E-mail text as HTML** if you wish e-mail body text to be sent as plain text. Sending text as HTML may be picked up as by some recipients e-mail services as SPAM.

If you wish to return to the *Configure E-mail Settings wizard*, click **Clear Settings** link to start again.

Edit e-mail settings

Depending on the e-mail service you are using you may need to edit some settings at a later date. For example if using your own e-mail service provider or you have manually configured the e-mail settings then you may need to change the password if you change your e-mail password.

1.   Do one of the following to display the e-mail window

- On the **File** menu, select **E-mail**

- Use Shortcut keys CTRL + M together

2.   To edit the settings do one of the following

- On the File menu in the "New Message" window select **E-mail settings...**

- Click the spanner icon in the toolbar

3   Edit any settings as required.

For example to change the password delete the existing value and enter a new value.

Locating your 'Outgoing Mail Server' settings in popular e-mail systems

The following information is not relevant if you are using the HandicapMaster E-mail Service.

If you wish to look up your current settings in your e-mail software, here are some instructions for common e-mail clients:

- Outlook Express

- Outlook 2019

- Outlook 2007

- Windows Mail

- Thunderbird

Outlook Express

a) In Outlook Express, on the toolbar click on **Tools** and then **Accounts** from the pull-down menu.

b) Click the **Mail** tab.

c) Highlight your e-mail account and click **Properties**.

d) Click **Servers** tab. The value for *Mail Server* box in HandicapMaster is the value displayed in **Outgoing mail (SMTP)**.

e) To check whether Authentication is configured, see **My server requires authentication**. If it does, click **Settings** for details.

f) Click **Advanced** tab. The value for *SMTP Port* box in HandicapMaster is the value displayed in **Outgoing mail (SMTP)**.

g) To check whether the e-mail server requires an encrypted connection, click **Advanced** tab. See **This server requires a secure connection (SSL)**.

Outlook 2019

a) In Outlook, from the main menu, choose **File** and then **Info** then click **Account Settings** and from the drop down menu select **Manage Profiles**

b) You may then need to confirm this action

c) Click **E-mail Accounts** and select the **E-mail** tab

d) Highlight your e-mail account in the list and click **Change**.

e) The value for *Mail Server* box in HandicapMaster is the value displayed in **Outgoing mail server (SMTP)**.

f) To check whether Authentication is configured, click **More Settings**, then **Outgoing Server** tab. See **My outgoing server (SMTP) requires authentication**.

g) To check the value for *SMTP Port* box in HandicapMaster, click **More Settings**, then **Advanced** tab. See **Outgoing mail (SMTP)** box.

h) To check whether the e-mail server requires an encrypted connection, click **More Settings**, then **Advanced** tab. See **Use the following type of encrypted connection [SSL]**.

Outlook 2007

i) In Outlook, from the main menu, choose **Tools** and then **Account Settings**.

j) Select **E-mail** tab.

k) Highlight your e-mail account in the list and click **Change**.

l) The value for *Mail Server* box in HandicapMaster is the value displayed in **Outgoing mail server (SMTP)**.

m) To check whether Authentication is configured, click **More Settings**, then **Outgoing Server** tab. See **My outgoing server (SMTP) requires authentication**.

n) To check the value for *SMTP Port* box in HandicapMaster, click **More Settings**, then **Advanced** tab. See **Outgoing mail (SMTP)** box.

o) To check whether the e-mail server requires an encrypted connection, click **More Settings**, then **Advanced** tab. See **Use the following type of encrypted connection [SSL]**.

Windows Mail

a) In Windows Mail, from the main menu, choose **Tools** and then **Accounts**.

b) Select **E-mail** tab.

c) Highlight your e-mail account in the list and click **Properties**.

d) Click **Servers** tab. The value for *Mail Server* box in HandicapMaster is the value displayed in **Outgoing mail (SMTP)**.

e) To check whether Authentication is configured, see **My server requires authentication**. If it does, click **Settings** for details.

f) Click **Advanced** tab. The value for *SMTP Port* box in HandicapMaster is the value displayed in **Outgoing mail (SMTP)**.

g) To check whether the e-mail server requires an encrypted connection, click **Advanced** tab. See **This server requires a secure connection (SSL)**.

Thunderbird

a) In Thunderbird, from the main menu, choose **Tools** and then **Account Settings**.

b) In the left hand column, select **Outgoing Server (SMTP).**

c) Select the account in the upper list. The value for *Mail Server* box in HandicapMaster is the value displayed alongside **Server Name**.

d) The value for *SMTP Port* box in HandicapMaster is the value displayed alongside **Port**.

e) If authentication is not being used, "<not specified>" will be displayed alongside **User Name**.

f) if your e-mail server does not require an encrypted connection, **Server Connection** will show as **None.**

See Also

- The New Message and Recipients Windows

- View E-mail Result Log

- Change the covering text created in the body of an e-mail for selected reports

- Change the 'From' e-mail address used

- Emailing ...

  - Handicap Certificates to Members

  - Subscriptions

- <u>Overdue Subscriptions</u>

- <u>Letters</u>

- <u>Reports</u>

- <u>Members, Away Members and Visitors</u>

- <u>Past Members or Past Visitors</u>

- <u>Golf Clubs</u>

- <u>HandicapMaster E-mail Service Terms of Service</u>

- <u>HandicapMaster E-mail Service Quota</u>

- <u>HandicapMaster E-mail Service Rejections</u>

8.2.3   The New Message and Recipients Windows

The New Message window allows you to set-up an e-mail. This includes selecting recipients adding a title to the e-mail, adding a file as an attachment and defining a footer or signature text.

To send an E-mail

1. Click the **To** or **CC** buttons to select a recipient for the e-mail. When you click on either of these buttons a <u>Recipients Window</u> will appear that will allow you to select the recipients. When you return to the New Message Window the names of the recipients will be displayed alongside the **To** or **CC** buttons.

   Note:

   If you add more than one recipient to the e-mail To or CC lists and send the e-mail, a separate e-mail will be sent to each recipient showing only their own e-mail address. This eliminates the need for using a Blind Copy (BCC) list of recipients (which is therefore not provided).

2. Title of the e-mail

 Enter a title for the e-mail in the **Subject** box.

3. Insert previous e-mail text

Click into the text box of the e-mail. Then on the **Edit** menu select **Insert Previous E-mail Text**, this will list the subject and a summary of the text of e-mails that were sent within the last 6 months. Select the one that you wish to insert in to the text box.

4. Attach a File

 You may attach one or more files or attachments to the e-mail as follows:

- Click on the **Attach File** button   in the toolbar, or

- From File menu select **Attach File**, or

- Press the SHIFT + INSERT keys

On the windows displayed click **ADD** to add a new file, select **REMOVE** to remove a file and **REMOVE ALL** to clear the list.

5. Enter your message text in the main box of this window.

If the **Spelling - Highlight unrecognised words** option is selected, words not recognised as part of a standard English-language dictionary are highlighted in blue. You may turn off this behaviour by clicking the Spelling button on the toolbar.

6. To receive a copy of the e-mail to your own e-mail account, tick the **Send a Copy to....** box.

Recipients Window

The Recipients Window allows you to select the recipients of the e-mail.

The list of recipients is a combination of

- [Distribution Lists](#)

- Members who have an e-mail address

- 'Other E-mail Recipient' addresses (to which new entries may be added)

To select a recipient tick the box alongside the name of the recipient.

To select all recipients in the list click **Select All** button.

To clear your selection either remove the tick from the box along side a name or click the **Clear All** button to clear all recipients.

To add an 'Other E-mail Recipient' enter the name and e-mail address of the recipient in the appropriate boxes and click the **Add Recipient** button.

The new recipient will be added to the list and be ticked automatically. This 'Other E-mail Recipient' will be available for use in future e-mails.

To prevent sending the e-mail to an added recipient remove the tick alongside their name.

Editing 'Other' recipients

In the Recipient list, click once to highlight and select an 'Other' recipient

- Right click and select **Edit Recipient** from the popup menu

- You may now edit the name or e-mail address of the 'Other' recipient. Click OK to save the changes.

Deleting 'Other' recipients

In the Recipient list, click once to highlight and select an 'Other' recipient

Do one of the following

- Right click and select **Delete Recipient** from the popup menu

- Press the **Delete** key on the keyboard

Note: It is not possible to delete distribution lists or members.

Amend E-mail Footer or Signature text

It is possible to set up a footer or signature text to be automatically added to an e-mail.

- Click on the **E-mail Signature** button   in the toolbar, or

- From File menu select **Signature**

Enter the signature text.

Note if you amend an existing signature this will be changed in the e-mail automatically.

The signature will be used in all future e-mails.

Notes:

- The first time that you send an e-mail , you will be asked to enter your e-mail settings. These are required to configure HandicapMaster to send e-mail.

- When e-mailing a report the report will be attached automatically and sent as a PDF attachment to the e-mail. This is indicated by the word "Report;" at the start of the **Attached** line. You may attach an additional file which may be in any other format.

- When sending an e-mail to a Distribution List only entries of the distribution list with a valid e-mail address will receive the e-mail.

- The list of recipients displayed alongside the To and CC buttons is for information only. To see full details of the recipients please click the **To** or **CC** button to view the Recipients Window.

- The Recipients window may be resized to make it easier to view large lists of recipients.

- See System Requirements to see if you are able to send e-mails from your computer.

- A separate e-mail footer is stored for each HandicapMaster Userid.

- When an e-mail is sent to one or more recipients, a copy of the text of the e-mail is saved for use at a future date.

See Also

- Configuring HandicapMaster to send E-mails

- View E-mail Result Log

- Change the covering text created in the body of an e-mail for selected reports

- Change the 'From' e-mail address used

- Emailing ...

  - Handicap Certificates to Members

  - Subscriptions

  - Overdue Subscriptions

  - Letters

  - Reports

  - Members, Away Members and Visitors

  - Past Members or Past Visitors

  - Golf Clubs

- [HandicapMaster E-mail Service Terms of Service](#)

- [HandicapMaster E-mail Service Quota](#)

- [HandicapMaster E-mail Service Rejections](#)

8.2.4   E-mail Logs

These reports allows you to review the status of e-mails created by *HandicapMaster.*

If you are using the *HandicapMaster.* e-mail service then you may also review recent e-mail rejections. These may occur some time after sending the e-mail. We recommend that you periodically review this log to determine if for example some of your e-mail addresses are no longer valid.

To view the E-mail Log

1.   Do one of the following:

- On the **Reports** menu, click **Membership Reports**, and click **E-mail Log**

- On the [Task/Explorer tab](#), click **Explorer** and then **Reports**, then select the **Membership** tab in the right-hand pane and select **E-mail Log**.

This will display entries from the log for the last three months. To view all records held in the log, select the **Export (all dates)** task in the left-hand column.

To print a copy of the log for a selected date, select the **View as Report** task in the left-hand column.

Note: The data in the log is automatically house kept so that older data is removed after a number of months.

To view the E-mail Summary log report

This log displays a count of e-mails sent by date.

1.   Do one of the following:

- On the **Reports** menu, click **Membership Reports**, and click **E-mail Summary Log**

- On the [Task/Explorer tab](#), click **Explorer** and then **Reports**, then select the **Membership** tab in the right-hand pane and select **E-mail Summary Log**.

 2.   Select a suitable date range for the data you wish to view.

Note: The data in the log is automatically house kept so that older data is removed after a number of months.

To View the E-mail Rejections Log report

1.   Do one of the following:

- On the **Reports** menu, click **Membership Reports**, and click **E-mail Rejections Log**

- On the [Task/Explorer tab](#), click **Explorer** and then **Reports**, then select the **Membership** tab in the right-hand pane and select **E-mail Rejections Log**.

See Also

- [Configuring HandicapMaster to send E-mails](#)

- The New Message and Recipients Windows

- Change the covering text created in the body of an e-mail for selected reports

- Change the 'From' e-mail address used

- Emailing ...

  - Handicap Certificates to Members

  - Subscriptions

  - Overdue Subscriptions

  - Letters

  - Reports

  - Members, Away Members and Visitors

  - Past Members or Past Visitors

  - Golf Clubs

- HandicapMaster E-mail Service Terms of Service

- HandicapMaster E-mail Service Quota

- HandicapMaster E-mail Service Rejections

8.2.5   The covering text and using fields with e-mails

When e-mailing copies of some reports in HandicapMaster, standard text is sent in the body of the e-mail automatically.

You may change the text send for these reports.

To change the covering text e-mailed

1. Do one of the following:

On the **File** drop-down menu, click **Options.** Select **Letters** tab and click **E-mail Text...**,

On the **File** drop-down menu, click **E-mail**. On the New Message window, click **File** menu, then **Edit default covering text...**

2. In the **Report** drop-down list, choose the report for which you wish to amend the covering text.

3. Amend the text to be used when e-mailing this report.

Using Field codes in the covering text

HandicapMaster will substitute 'special' words (known as Fields) in the e-mail body text for relevant information when the e-mail is sent.

The following fields are recognised and, if present in the text body, will be substituted when the e-mail is sent:-

Field	**Text Substituted**
<Name>	The full name of the addressee

\<Surname\>	The Surname of the addressee
\<GivenName\>	The First (or Given) name of the addressee
\<MemberTitle\>	The title (Mr, Mrs, etc) of the addressee
\<DOB\>	The Date of Birth of the addressee, 'not known' will be displayed if there is no date of birth information for the addressee
\<EmailAddress\>	The Email address of the addressee.
\<TelephoneNo\>	The Telephone number of the addressee.
\<MobileNo\>	Mobile Telephone number of the addressee.
\<FaxNo\>	The Fax Number or Other Telephone Number of the addressee
\<MemberAddress\>	The address of the addressee.
\<HandicapIndex\>	The current exact handicap of the addressee or 'No Handicap yet awarded' if the addressee does not have a current Handicap. NOTE this information may not be available in all regions due to regulatory restrictions.
\<ExactHandicap\>	Same as \<HandicapIndex\> This field is deprecated, and \<HandicapIndex\> should be used.
\<MembershipCardNo\>	Member's membership card number.
\<Category\>	The Membership Category of the addressee.
\<LockerNo\>	The Locker Number of the addressee.
\<MembershipNo\>	The Membership number of the addressee.
\<PinNo\>	The PIN number of the addressee.
\<NationalID\>	The National ID of the addressee (allocated to the player on the National Database of Handicaps). NOTE this information may not be available in all regions
\<UserField1\>	The first listed 'user defined field' value allocated to the addressee.
\<UserField2\>	The second listed 'user defined field' value allocated to the addressee.
\<UserField3\>	The third listed 'user defined field' value allocated to the addressee.
\<CurrentTime\>	The time when the e-mail is created
\<CurrentDate\>	The date when the e-mail is created

The angle brackets ('<' and '>') denote the beginning and end of a field and are required for the field to be recognized. The fields are not case sensitive. That is, \<NAME\> \<name\> and \<Name\> will all be substituted.

Some fields may not be available in all editions of HandicapMaster.

<div style="border:1px solid; background:#FFFFCC;">

See Also

</div>

- Configuring HandicapMaster to send E-mails

- The New Message and Recipients Windows

- View E-mail Result Log

- Change the 'From' e-mail address used

- Emailing ...

  - Handicap Certificates to Members

  - Subscriptions

  - Overdue Subscriptions

  - Letters

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8.2.6   Change the 'From' E-mail address used

If you need to change the *From* e-mail address used when sending out e-mails, or other settings related to sending e-mails, you may do this through the e-mail settings window.

<div style="border:1px solid; background:#FFFFCC;">

To change the 'From' e-mail address

</div>

If you have HandicapMaster configured to request a user and password on start-up, login with the applicable user. A separate set of e-mail settings is maintained for each user login.

1. Do one of the following

   - On the **File** menu, select **E-mail**

   - Use Shortcut keys CTRL + M together

2. Do one of the following in the *New Message* window

   - On the **File** menu, select **E-Mail Settings**

   - Click the **Configure E-mail Settings** button on the toolbar (shown with a *spanner* icon)

3. Change the settings as required. See E-mail Settings.

<div style="border:1px solid; background:#FFFFCC;">

See Also

</div>

- Configuring HandicapMaster to send E-mails

- [The New Message and Recipients Windows](#)

- [View E-mail Result Log](#)

- [Change the covering text created in the body of an e-mail for selected reports](#)

- Emailing ...

    - [Handicap Certificates to Members](#)

    - [Subscriptions](#)

    - [Overdue Subscriptions](#)

    - [Letters](#)

    - [Reports](#)

    - [Members, Away Members and Visitors](#)

    - [Past Members or Past Visitors](#)

    - [Golf Clubs](#)

- [HandicapMaster E-mail Service Terms of Service](#)

- [HandicapMaster E-mail Service Quota](#)

- [HandicapMaster E-mail Service Rejections](#)

8.2.7 E-mailing Handicap Certificates

May not be available in all regions due to regulatory restrictions.

When you click the [E-mail Report button](#) to e-mail the **Handicap Certificate** report, the behaviour of HandicapMaster changes.

In this situation, HandicapMaster creates e-mails with the handicap certificate as attachments to the e-mail. This is in place of the report on screen.

Notes:

- The Handicap Certificate is automatically added to the e-mail as PDF attachment.

- Certificates will only be sent to those members with a valid e-mail address

- Members will only receive their own Handicap Certificate.

- The Signature on the Handicap Certificate attachment may be set in the [global options](#) by setting the Signatory on Letters

- You will be prompted to decide if you wish to receive a copy of each handicap certificate e-mail sent. If you select Yes then you may receive many e-mails in your inbox

- You may [change the covering text created in the body of the e-mail](#)

See Also

- [Configuring HandicapMaster to send E-mails](#)

- [The New Message and Recipients Windows](#)

- View E-mail Result Log

- Change the covering text created in the body of an e-mail for selected reports

- Change the 'From' e-mail address used

- Emailing ...

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  - Letters

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8.2.8   E-mailing Subscriptions

> Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

When you click the E-mail Report button to e-mail the Subscriptions , the behaviour of HandicapMaster changes.

In this situation, HandicapMaster creates e-mails with the subscription invoices as attachments to the e-mail. This is in place of the report on screen.

At the end of the sending of the e-mails there is an option to print the subscriptions for those members who either do not have an e-mail address or who have not opted to receive subscriptions by e-mail.

To send Subscriptions by e-mail

1. Select the members who have opted to receive their subscriptions by either:

- selecting **Send Subscriptions, Invoices, Receipts by E-mail** on the Subscriptions Tab of the Edit Member facility.

- or on the **Accounting** menu select **Configure** and select **Members who receive correspondence by e-mail** and select the required members

2. Run the Raise Subscription Wizard

3. Click the **E-mail Report**   button on the Reports Toolbar.

4. You will be prompted to add an attachment file in addition to the subscription. Click **Yes** and then browse and select the file you wish to attach. This may be a document of any format.

5. If there are any members who either do not have an e-mail address or who have not opted to receive subscriptions by e-mail Click **Yes** at the prompt that will be displayed and select the required printer to print the subscriptions.

6. A summary of the e-mails sent will then be displayed.

Notes:

- The subscription is automatically added to the e-mail as PDF attachment.

- If a member has opted out under GDPR to receive e-mails this will take precedence and prevent any subscriptions being sent to that member by e-mail.

See Also

- Configuring HandicapMaster to send E-mails

- The New Message and Recipients Windows

- View E-mail Result Log

- Change the covering text created in the body of an e-mail for selected reports

- Change the 'From' e-mail address used

- Emailing ...

  - Handicap Certificates to Members

  - Overdue Subscriptions

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8.2.9   E-mailing Overdue Subscriptions

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

When you click the E-mail Report button to e-mail the overdue Subscriptions , the behaviour of HandicapMaster changes.

In this situation, HandicapMaster creates e-mails with the overdue subscription invoices as attachments to the e-mail. This is in place of the report on screen.

At the end of the sending of the e-mails there is an option to print the overdue subscriptions for those members who either do not have an e-mail address or who have not opted to receive subscriptions by

e-mail.

To send Subscriptions by e-mail

1. Select the members who have opted to receive their subscriptions by e-mail on the Subscriptions Tab of the Edit Member facility.

2. Run the Overdue_Subscriptions_Wizard

3. Click the **E-mail Report** button on the Reports Toolbar.

4. To print the overdue subscriptions for those members who either do not have an e-mail address or who have not opted to receive subscriptions by e-mail Click Yes at the prompt and select the required printer.

Notes:

- The overdue subscription is automatically added to the e-mail as PDF attachment.

See Also

- Configuring HandicapMaster to send E-mails

- The New Message and Recipients Windows

- View E-mail Result Log

- Change the covering text created in the body of an e-mail for selected reports

- Change the 'From' e-mail address used

- Emailing ...

  - Handicap Certificates to Members

  - Subscriptions

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  - Reports

  - Members, Away Members and Visitors

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8.2.10 E-mailing Letters

When you have written a letter it is possible to send the letter by e-mail to recipients who have a valid e-mail address.

1. Click the **E-mail Report** button   on the Reports Toolbar.

2. You will be prompted to add an attachment.

3. Select **Yes** to add an external document to the e-mail.

4. The letter for each recipient will be will be sent to that recipients e-mail account.

5. To print the letters for those members who do not have an e-mail address click Yes at the prompt and select the required printer.

A typical example of a letter to be sent may be to advise members of future dated competitions that have been configured in *HandicapMaster.*

Notes:

- The letter is automatically added to the e-mail as PDF attachment.

- To send an e-mail without a letter on the File menu, select E-mail.

See Also

- Configuring HandicapMaster to send E-mails

- The New Message and Recipients Windows

- View E-mail Result Log

- Change the covering text created in the body of an e-mail for selected reports

- Change the 'From' e-mail address used

- Emailing ...

  - Handicap Certificates to Members

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8.2.11 E-mailing Reports

Reports may be sent easily by clicking the E-mail button on the Reports Toolbar. Reports are automatically added to the e-mail as PDF attachments. This is indicated by the word "Report;" at the start of the **Attached** line. You may attach an additional file.

Send an e-mail to players without the report

It is possible to remove the attached report if you wish to send an e-mail message to the players on the

report. For example a reminder to the players on a start sheet, or the players in a Match Play draw and other reports as follows:

1. Display the appropriate report.

2. Click the E-mail button on the Reports Toolbar, the report will be attached.

3. On the 'New Message' window click on the on the **Attach File** button in the toolbar, or

- From File menu select **Attach File**, or

- Press the SHIFT + INSERT keys

Select the "Report" attachment and then click REMOVE.

4. Please be sure to then edit the e-mail text to remove reference to the 'attached report'.

Notes:

- For some reports only the section of the report relevant to a member will be sent by e-mail.

- For Subscriptions, Overdue Subscriptions at the end of sending by e-mail there is an option to print out those letters for members who do not opt to receive subscriptions by e-mail.

- For Letters at the end of sending by e-mail there is an option to print out those letters for members without e-mail addresses.

- For some reports, you may change the covering text created in the body of the e-mail.

See Also

- Configuring HandicapMaster to send E-mails

- The New Message and Recipients Windows

- View E-mail Result Log

- Change the covering text created in the body of an e-mail for selected reports

- Change the 'From' e-mail address used

- Emailing ...

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  - Subscriptions

  - Overdue Subscriptions

  - Letters

  - Members, Away Members and Visitors

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8.2.12 E-mailing Members, Away Members and Visitors

To e-mail an individual Member, Away Member or Visitor

1. Do one of the following:

   - Go to the appropriate member list either **All Members**, **Away Members**, or **Visitors**

   - In the list, select a Member and press **Enter Key**,

   - or, select a Member right click and select **Edit** from the popup menu.

2. Enter an e-mail address if required and then click the Send E-mail button

NOTE

If the Member, Away Member or Visitor already has an e-mail address then:

- In the appropriate list click once to highlight their name, right click and select **Send E-mail**

To e-mail to multiple Members, Away Members or Visitors

You may either:

- Use a Distribution List of Members, Away Members or Visitors and select this as the recipient of the e-mail.

- Export the Member or Visitor membership details and use an external "mail merge" facility to send correspondence to past Members.

See Also

- Configuring HandicapMaster to send E-mails

- The New Message and Recipients Windows

- View E-mail Result Log

- Change the covering text created in the body of an e-mail for selected reports

- Change the 'From' e-mail address used

- Emailing ...

  - Handicap Certificates to Members

  - Subscriptions

  - Overdue Subscriptions

  - Letters

  - Reports

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8.2.13 E-mailing Past Members or Past Visitors

To e-mail an individual Past Member or Visitor

1. Do one of the following:

    - In the Past Members list, select a Member and press **Enter Key**,

    - In the Past Members list, select a Member right click and select **Edit** from the popup menu.

    - In the Past Members list, select a Member right then select **Edit a Membership record** from the **Previous Member Tasks**

2. Enter an e-mail address if required and then click the Send E-mail button

NOTE

If the Past Member or Past Visitor already has an e-mail address then:

- In the Past Members list click once to highlight their name, right click and select **Send E-mail**

To e-mail to multiple Past Members or Past Visitors

You may either:

- Use a Distribution List of Past Members or Past Visitors and select this as the recipient of the e-mail.

- Export the Past Member or Past Visitor membership details and use an external "mail merge" facility to send correspondence to past Members.

See Also

- Configuring HandicapMaster to send E-mails

- The New Message and Recipients Windows

- View E-mail Result Log

- Change the covering text created in the body of an e-mail for selected reports

- Change the 'From' e-mail address used

- Emailing ...

    - Handicap Certificates to Members

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    - Overdue Subscriptions

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8.2.14 E-mailing Golf Clubs

May not be available in all regions due to regulatory restrictions.

To e-mail an individual Golf Club

1. Do one of the following:

    - On the **Players** menu, click **Golf Courses**, then **Golf Club Contact Details** and choose the applicable Golf Club from the Golf Courses lists.

    - In the Golf Course list, select **an existing Golf Course** and click the **Golf Club Contact Details** task.

2. Enter the e-mail address for this club if required

3. Click the **Send E-mail** button

4. When you send the e-mail click the **OK** button to save the details.

To e-mail to multiple Golf Clubs

- Create a Distribution List of Golf Clubs

- Select this distribution list as the recipients of the e-mail.

Notes:

You will need to supply the e-mail address of the Golf Club before it may be added to a Distribution List.

See Also

- Configuring HandicapMaster to send E-mails

- The New Message and Recipients Windows

- View E-mail Result Log

- Change the covering text created in the body of an e-mail for selected reports

- Change the 'From' e-mail address used

- Emailing ...

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    - Subscriptions

    - Overdue Subscriptions

- Letters

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8.2.15 HandicapMaster E-mail Service Terms Of Service

HandicapMaster Limited provides its E-mail service to you, subject to the Terms of Service , which may be updated by us from time to time without notice to you.

By licencing your organisation with HandicapMaster, you agree to the terms of this Agreement, and you re-affirm that agreement every time you use it.

> **See Also**

- Configuring HandicapMaster to send E-mails

- The New Message and Recipients Windows

- View E-mail Result Log

- Change the covering text created in the body of an e-mail for selected reports

- Change the 'From' e-mail address used

- Emailing ...

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    - Subscriptions

    - Overdue Subscriptions

    - Letters

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    - Golf Clubs

- HandicapMaster E-mail Service Quota

- HandicapMaster E-mail Service Rejections

8.2.16 HandicapMaster E-mail Service Quota

As per our terms of service [Terms of Service](#) to ensure fair use of the HandicapMaster e-mail service we have implemented a quota system to prevent excessive use of the e-mail service.

This is implemented as a 30 day rolling quota system. The quota is based on a number of database parameters. So the quota can change over time.

The quota is larger for customers using our GOLD editions.

If a customer requires a increase for a temporary period please contact HandicapMaster Limited Support who can assist.

If a customer requires a significant sustained increase in the quota we can arrange this for a additional annual fee or you can if operating our SILVER edition consider an upgrade to our GOLD edition which has a higher quota.

Customers will receive a notification dialog in HandicapMaster when they have used 80 percent of their quota. Followed by periodic reminders.

When the number of e-mails is close to the quote additional messages will be displayed.

Note

The HandicapMaster e-mail service quota system only applies to the HandicapMaster e-mail service. If you are using a 3rd party e-mail service then there is no quota in HandicapMaster , but the 3rd party provider may implement a quota system.

See Also

- [Configuring HandicapMaster to send E-mails](#)

- [The New Message and Recipients Windows](#)

- [View E-mail Result Log](#)

- [Change the covering text created in the body of an e-mail for selected reports](#)

- [Change the 'From' e-mail address used](#)

- Emailing ...

    - [Handicap Certificates to Members](#)

    - [Subscriptions](#)

    - [Overdue Subscriptions](#)

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8.2.17 HandicapMaster E-mail Service Rejections

When using the HandicapMaster E-mail Service, a report of recent rejections is available.

A rejection may not be seen until sometime after sending the e-mail.

Depending on the nature of the rejection you may wish to clear the rejection.

A typical example would be where a recipient has accidentally reported an e-mail from your organisation as SPAM, or has previously un-subscribed from receiving e-mails, but now wishes to receive further e-mails from your organisation.

Other rejections may be caused by invalid e-mail address (but clearing that type of rejection would be pointless).

To View the E-mail Rejections Log

1.   Do one of the following:

- On the **Reports** menu, click **Membership Reports**, and click **E-mail Rejections Log**

- On the Task/Explorer tab, click **Explorer** and then **Reports**, then select the **Membership** tab in the right-hand pane and select **E-mail Rejections Log.**

To Clear an E-mail Rejection

1.   For **Members** do one of the following:

- In the Players list, select a Member and press ENTER Key, or

- In the Players list, select a Member, then on the **Players** menu, click **Edit Member**, or

- On the **Players** menu, click **Edit Member** and select a Member from the list displayed.

2.   For **Visitors** do one of the following:

- In the Visitors list, select a Visitor and press ENTER Key, or

- In the Visitors list, select a Visitor, then on the **Players** menu, click **Edit Visitor**, or

- On the Players menu, click **Edit Visitor** and select a player from the list displayed.

3. Select the **Contact Details** tab

4. Click the *Clear Rejection* button

5. If the member or visitor has a current rejection, the reason for the rejection and when it was created will be displayed.

6. Review the rejection reason and if reason is not a permanent error e.g. an invalid e-mail address then confirm you wish to remove the rejection. But **ONLY** if the recipient has agreed.

Notes

- Typically the rejection reason is provided by the recipient's e-mail service and may be quite terse or in some cases may contain detailed technical information.

- Rejections should only be removed where the recipient has confirmed that they wish to continue to receive e-mails from your organisation.

- Repeatedly removing a valid rejection may cause a loss of reputation in the HandicapMaster E-mail Service and may result in suspension of the service for your organisation.

See Also

- Configuring HandicapMaster to send E-mails

- The New Message and Recipients Windows

- View E-mail Result Log

- Change the covering text created in the body of an e-mail for selected reports

- Change the 'From' e-mail address used

- Emailing ...

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8.3   Writing Letters to Members

8.3.1   Letters Introduction

HandicapMaster provides a convenient way of producing formatted letters to members, automatically picking up the correct name and address (or names and addresses) for the member(s). The body of text for the Letters are maintained in the HandicapMaster database for future re-use.

Letters that have been produced may either be printed or may be e-mailed to members with a valid e-mail address.

The letter text may be formatted in a number of ways and different fonts may be mixed in a letter.

Letters may contain 'clipart' or bit-mapped image files (with some limitations).

8.3.2   Write a new Letter

To write a new letter

1. Do one of the following:

    - On the **Players** menu, click **Letters**, and click **New** if the Select A letter window is shown

    - In the Letters list, select **any existing letter** and press **ENTER** key. On the Letters Window, click **File** menu then **New**.

2. Enter a title for this letter in the **Title** box. This title will be used to index the letter in the HandicapMaster database.

3. Select one or more recipients for the Letter by ticking the applicable boxes in the **Recipients** list.

    You may choose between:

    - Category and or member
    - Visitors
    - Distribution lists
    - Entrants from a closed competition

    Your choice will be used when creating letters.

4. Click the **Body of Letter** tab

5. Write the letter in the **Body of Letter** box, as required.

6. Click **Run Letter**.

Notes:

- Do not include the address or name of the intended recipient, or the greeting (i.e. the 'Dear Sir'). Only include the body of the text.

- It is only possible to send letters to Distribution Lists for Members and Past Members. Other types of distribution list are not available as letter recipients.

- You may directly paste bitmap files (extension *.bmp) or Graphics Interchange Format (extension *. gif) or Joint Photographic Experts Group (extension .*.jpg , *.jpeg or *.jpe) or Portable Network Graphics (extension *.png). into the letter . There is a variable size limit per image depending on the format used, if the image file is too large a message will be displayed.

- Images if entered into a middle of a paragraph in the letter, will still be drawn left-aligned (effectively as a new paragraph).

- If you choose the Entrants from a closed competition recipient then you will be able to select the closed competition that contains the recipients you wish to send the letter to. Only a single closed competition may be selected

See Also

- Change the Font used in Letters

- Configure the Layout of Letters

- Change the Salutation ("Dear") line used in Letters

- Add Letterheads to Letters

- Using Fields in Letters

- Sending Letters by E-Mail

8.3.3   Resend a Saved Letter

To send an existing letter to a member

1.   Do one of the following:

- On the **Players** menu, click **Letters**, and choose the letter to resend if the Select A letter window is shown

- In the Letters list, select **any existing letter** and press **ENTER** key

3.   Select one or more recipients for the Letter by ticking the applicable boxes in the **Recipients** list.

You may choose between:

- Category and.or member
- Visitors
- Distribution lists
- Entrants from a closed competition

Your choice will be used when creating letters.

4.   Click the **Body of Letter** tab

5.   Make any amendments to the letter in the **Body of Letter** box, as required.

6.   Click **Run Letter**.

8.3.4   Delete a Saved Letter

To Delete a Letter previously saved in the HandicapMaster database

1.   Select the letter to be deleted. Do one of the following:

   - On the **Players** menu, click **Letters**, and choose the letter to be deleted if the Select a Letter window is displayed.
   - In the Letters list, select the letter to be deleted**.**

2.   Delete the selected letter. Do one of the following:
   - Select **Delete an existing Letter** task in the task bar.
   - Right-click the selected letter and choose **Delete**.
   - In the Letters list, press the **DELETE** key.
   - Edit the selected letter, then, on the **File** menu, click **Delete**

8.3.5   Write a Letter of Introduction for a Member

HandicapMaster will generate a letter of introduction for a home member.
This may include details of their current Handicap (May not be available in all regions due to regulatory restrictions., and national ID (where available).

To produce a Letter of Introduction

1.   On the **Players** menu, click **Letter of Introduction**
2.   If the Select a Player window is displayed, choose the applicable Member (must be a Home Club player)

HandicapMaster creates a letter like

```
 Dear Secretary,

 Re: John Smith

 May I introduce you to John Smith who is a member of good standing within <Your
```

Organisation Name here>. Currently, he has a Handicap of 17.4

Is player 'XXXXXXXXXX' on the YYYY database.

Any courtesies you are able to extend to him will be much appreciated.

Yours Sincerely,

Notes:

- The font selected for the salutation is also used for text of the Letter of Introduction this may be changed by adjusting the Salutation font

- You may paste bitmap files (.BMP) into the letter text. There is a file size limit of 512KB.

- HandicapMaster will use **he/she** and **him/her** as appropriate for the member's gender.

- Note <*Your Organisation Name here>* will be replaces wtih the name of your organisation.

- Note re: Handicap. May not be available in all regions due to regulatory restrictions.

- Note re: Is player 'XXXXXXXXXX' on the YYYY database. Where 'XXXXXXXXXX' is the players national ID and YYYY is the name of the database. This information will only be displayed where a national database provides this data.

See Also

- Change the Font used in Letters

- Configure the Layout of Letters

- Add Letterheads to Letters

8.3.6 Change the Font used in Letters

To change the Font in the body of the Letter

1. Write or edit any existing Letter.

2. Select the text you wish to have its font changed

3. On the **Format** menu, click **Font**.

4. Choose the font attributes, as required.

5. Click OK.

Or select the Font and size and attributes using the toolbar

See Also

- Address and Date font

- Salutation font

Notes:

- You may select text using the mouse to click and press to select text, or double click a section of text.

- You may use different fonts and attributes within different sections of the body of the letter.

8.3.7   Configure the Layout of Letters

It is possible to reposition where then main items on letters are written (address field, date and body of letter) in the event of the default setting not being suitable. This may be in the circumstance when the Address field is overprinting the club Letterhead, for example.

To change the positioning of letter items

1.   Write or edit any existing Letter.

2.   On the **Format** menu, click **Layout**.

3.   In the Layout window, enter the appropriate distances to be used by HandicapMaster as detailed on the window. Valid values are 0 to 15 cm's inclusive.

4.   Click **OK**.

To reset the values back to HandicapMaster defaults

1.   Write or edit any existing Letter.

2.   On the **Format** menu, click **Layout**.

3.   In the Layout window, click **Reset**.

4.   Click **OK**.

To select the Font for Address and Date information

1.   Write or edit any existing Letter.

2.   On the **Format** menu, click **Layout**.

3.   In the Layout window, click **Set Font to use for address and date**. Chose the required font and click OK

4.   Click **OK**.

8.3.8   Change the Salutation used in Letters

By default, HandicapMaster automatically includes a salutation line of "Dear <Name>" in each letter, where <Name> is the first name of the recipient.

It is possible to change the way HandicapMaster generates the "Dear <Name>" line in the Letter (or turn off the automatic generation of this line altogether).

To change the Salutation Line

1. Write or edit any existing Letter.

2. On the **Format** menu, click **Salutation**.

3. In the Layout window, chose and appropriate layout for your letters.

4. Click **OK**.

To select the Font for the Salutation Line

1. Write or edit any existing Letter.

2. On the **Format** menu, click **Salutation**.

3. In the Layout window, click **Set Font to use for salutation line**. Chose the required font and click OK

4. Click **OK**.

NOTE

- The selected salutation font will also be used for the main text of the Letter of Introduction

8.3.9 Using Fields in Letters

HandicapMaster will substitute 'special' words (known as Fields) in the body of the letter for relevant information when the letter is produced.

If one or more names are ticked in the recipients box then the relevant information relating to that field will be substituted for the Text between the tags. Thus if John Smith is selected in the recipients letters window, any text in the body of the letter with the word <NAME> will come up as John Smith or if <SURNAME> then if will come up as Smith.
If for example 6 recipients boxes are selected, then 6 letters will be printed each with the relevant information substituted for the individual recipient.

The following fields are recognised and, if present in the body of a letter, will be substituted:-

Field	Text Substituted
<Name>	The full name of the addressee.
<GivenName>	The First (or Given) name of the addressee.
<Surname>	The Surname of the addressee.
<MemberTitle>	The title (Mr, Mrs, etc) of the addressee.
<DOB>	The Date of Birth of the addressee, 'not known' will be displayed if there is no date of birth information for the addressee
<EmailAddress>	The Email address of the addressee.
<TelephoneNo>	The Telephone number of the addressee.
<MobileNo>	Mobile Telephone number of the addressee.
<FaxNo>	The Fax Number or Other Telephone Number of the addressee
<MemberAddress>	The address of the addressee.

<Handicap>	The current exact handicap of the addressee or 'No Handicap yet awarded' if the addressee does not have a current Handicap. NOTE this information may not be available in all regions due to regulatory restrictions.
<ExactHandicap>	Same as <Handicap> This field is deprecated, and <Handicap> should be used.
<MembershipCardNo>	Member's membership card number.
<Category>	The Membership Category of the addressee.
<LockerNo>	The Locker Number of the addressee.
<MembershipNo>	The Membership number of the addressee.
<PinNo>	The PIN number of the addressee.
<NationalID>	The National ID of the addressee (allocated to the player on the National Database of Handicaps). NOTE this information may not be available in all regions.
<UserField1>	The first listed 'user defined field' value allocated to the addressee.
<UserField2>	The second listed 'user defined field' value allocated to the addressee.
<UserField3>	The third listed 'user defined field' value allocated to the addressee.
<HomeClub>	The name of the member's Home Club.
<FutureCompetitions>	A list of future dated competitions including date and venue.
<FutureCompsLadies>	A list of future dated competitions including date and venue only open to Ladies.
<FutureCompsMen>	A list of future dated competitions including date and venue only open to Men.
<ClubAddress>	The address of the Club as defined in the **Include Address** and **Second Line** of the letterhead. This may be useful if you wish to add a "tear off" slip to the letter with the club contact details.
<Signatory>	Include the name and title of the club signatory.
<NewPage>	If included, will force a skip to a new page in the Letter.
<AmountsPaid>	Where the Subscriptions Option is NOT installed this field will display the date paid and the amounts recorded for a single subscription payment, locker fee and other amount along with the total.

The angle brackets ('<' and '>') denote the beginning and end of a field and are required for the field to

be recognized. The fields are not case sensitive. That is, <NAME> <name> and <Name> will all be substituted.

Letter body of 'This is a letter to be sent to <Name>.' will be produced as 'This is a letter to be sent to John Smith.'

Additional subscription related fields are available when the Subscriptions Option has been installed as a licenced option. If these are not available, then the Subscriptions Option may not be installed.

Field	Text Substituted
<AccountBalance>	The Account Balance of the member's account.
<CompetitionPurseBalance>	The member's Competition Fee Purse balance.
<CompetitionPurseTransactions>	A list of all the member's Competition Fee Purse transactions.
<CompetitionPurseTransactionsLast10>	A list of the 10 most recent member's Competition Fee Purse transactions or less if a member has less than 10 transactions.
<Subscription>	A summary table of the member's subscription. This includes a list of the Payment Items, their value and the total value of the subscription.
<InvoiceNumber>	The Subscription invoice number.
<FirstPayment>	The gross amount due in the first payment. If the subscription has an annual payment schedule (i.e. 1 payment) this will equal the Gross Total. If another payment schedule is selected then this is the initial payment to be made by the member
<PaymentMethod>	Member's default method of payment
<NumberOfPayments>	The number of payments that the member is due to make to pay the subscription.
<NumberOfOtherPayments>	The number of subsequent payments due after the initial payment is made. If the subscription has an annual payment schedule (i.e. 1 payment) this will be value 0.
<OtherPayments>	The gross amount due for any subsequent payments. If the subscription has an annual payment schedule (i.e. 1 payment) this will be

	value 0. If another payment schedule is selected then this is the gross value of each subsequent payment after the initial first payment.
<PaymentSchedule>	A table listing the payment schedule which includes payment due dates, amount and status for the subscription payments.
<GrossTotal>	The Gross total of the subscription.
<VATTotal>	The VAT total for the subscription.
<NettTotal>	The net total of the subscription.
<Transactions>	A member's transaction history for all dates.

The angle brackets ('<' and '>') denote the beginning and end of a field and are required for the field to be recognized. The fields are not case sensitive. That is, <SUBSCRIPTION> <subscription> <Subscription> will all be substituted.

Notes:

- When the subscription involves multiple payments the first payment may be different from subsequent payments. This is to cope with the situation where the total amount is not exactly divisible by the number of payments to be made.

8.3.10 Add Letterheads to Letters

HandicapMaster may automatically generate a Letterhead on any Letter that is created. If selected, the Letterhead will consist of the Club name on the top line and two additional lines are entered.

To add Letterheads to Letters

1. On the **File** menu, click **Options**.
2. Click the **Letters** tab.
3. Tick the **Add Letterhead to Letters** box.
4. Enter Address information into the **Include Address** and **Second Line** boxes, as required
5. Click **OK**.

To include a picture (or logo) in the Letterhead

1. Add a picture to the reports in HandicapMaster by selecting **Reports** menu, then **Layout and Options**.
2. On the **File** menu, click **Options**.
3. Click the **Letters** tab.
4. Tick the **Include Picture in Heading** box to include the picture in the Letterhead.
5. Tick the **Align Picture Left** box to have the picture left-aligned on the letter page.

Note:

It is possible to show a picture or logo in the letter heading, without text. To do this, tick the **Include Picture in Heading** box and do not tick the **Add Letterhead to Letters** box.

8.3.11 Sending Letters by email

When you have written a letter it is possible to send the letter by e-mail to recipients who have a valid e-mail address.

1. Click the **E-mail Report** button on the Reports Toolbar.

2. You will be prompted to add one or more attachments

3. Select **Yes** and then click **Add** and select the file you wish to attach, repeat for any additional files. These may be documents of any format.

4. The letter for each recipient will be will be sent to that recipients e-mail account.

Notes:

- The letter is automatically added to the e-mail as PDF attachment.
- When sending letters to distribution lists you may send letters by e-mail to Distribution Lists for Members, Visitors, Past Members and Past Visitors. Other types of distribution list are not available as the recipient of letters by e-mail.

8.4   Distribution Lists

8.4.1   Introduction

Distribution Lists are designed to assist with communication by Letter or E-mail.

To allow for management of different recipients the following types of distribution list are available.

- Members

- Past members

- Visitors

- Past visitors

- Golf clubs

- Other e-mail recipients

- Group Bookings

Some possible uses of Distribution Lists are:

- Send e-mails to a number of Golf Clubs, e.g. details of a local area competition.

- Send a report by e-mail to recipients in a Distribution List . For example send competition results by e-mail.

- Contact Past Visitors with details of open competitions.

- Contact Past Members with details of membership "offers".

- Address a Letter to a distribution list. Each member of the 'Members' or 'Past Members' distribution list will get a letter addressed to them as an individual. (Other distribution lists are not available when sending letters)

- Produce address labels for 'Members', 'Past Members', 'Visitor', 'Past Visitor' and 'Club' distribution lists

- send marketing information to the organisers of Group Bookings

Only 'Members', 'Past members', 'Visitors' and 'Past visitors' types of distribution list are available when sending letters.

All types of distribution lists may be used when sending e-mails.

Member, Past Member, Visitor and Past Visitor distribution lists allow selection by one or more of the following:

- Gender

- Age Group

- Handicap Range   (May not be available in all regions due to regulatory restrictions.)

In addition Member and Past Member distributions lists also allow selection by

- Membership Category

Member, Past Member, Visitor and Past Visitor distribution lists may also be defined to **Automatically add and maintain entries in list**. Meaning that when a member detail changes e.g. age group they will be added/removed automatically from a distribution list where they no longer meet, or now meet the

selection criteria.

These distribution lists may be used when sending e-mail or in the letter writer. In these situations they will be updated automatically if the **Automatically add and maintain entries in list** option is selected.

Contents

Notes:

- When sending an e-mail to members of a Distribution List only members of the distribution list with a valid e-mail address will receive the e-mail.

- 'Members', 'Past members', 'Visitors' and 'Past visitors' distribution list are available when sending letters. Other types of distribution list are not available for use when sending letters.

- The Bookings facility is available in the Gold editions of HandicapMaster. Group Bookings are only available with those editions.

8.4.2   Add a new Distribution List

To add a new Distribution List to HandicapMaster

1.   Do one of the following:

- On the **Players** drop-down menu, click **Distribution Lists**

- On the Task/Explorer tab, click **Explorer** and then , then select **Distribution Lists**.

   Existing Distribution Lists are displayed.

2.   Select **Add a New List** from the **Distribution Lists Tasks** or press the INSERT key to add a new Distribution List.

3.   Configure the list using the Distribution Lists Wizard.

Notes:

- Once a distribution list has been added, the type of data contained in the distribution list may not be changed.

8.4.3   Edit a Distribution List

To edit a Distribution List in HandicapMaster

1.   Do one of the following:

- On the **Players** drop-down menu, click **Distribution Lists**

- On the Task/Explorer tab, click **Explorer** and then , then select **Distribution Lists**.

   Existing Distribution Lists are displayed.

2. Highlight the list you wish to edit with a single click.

3. Select **Edit a List** from the *Distribution Lists Tasks* or right click with the mouse and select **Edit List**.

4. Configure the list using the Distribution Lists Wizard.

8.4.4   The Distribution Lists Wizard

The Distribution List Wizard steps through the stages of creating or editing the format of a list.

Page 1

1. Enter the **Name of Distribution List**.

2. Select the **Type of distribution list** to be created from one of the following

   - Members

   - Past Members

   - Visitors

   - Past Visitors

   - Golf Clubs

   - Other E-mail Recipients

   - Group Bookings

3. For **Golf Clubs**, **Other E-mail Recipients** and **Group Bookings** distribution lists click **OK**.

For Member, Past Member, Visitor and Past Visitor distribution lists:

4. Click **NEXT >>**

Page 2

7. To restrict the distribution list to a single gender un-tick the appropriate gender.

8. Tick **Automatically add and maintain entries in list** if you wish the list to be automatically updated by HandicapMaster based on the selection criteria selected. If you do not tick this option then you may manually adjust the entries in the distribution list.

9. Click **NEXT >>**

Page 3

10. To limit the distribution list to a selection of Age Groups tick **In selected Age Groups**. Then select the appropriate age groups from the items displayed

11. To limit the distribution list to a selection of Membership Categories tick **In selected Membership Categories**. Then select the appropriate Membership Categories from the items displayed. This option is not available for Visitor or Past Visitor distribution lists.

12. To limit the distribution list to a range of handicaps tick **Holding handicaps within a range**. Then either type or use the up/down arrows to set the **Handicap From** and **To** values. (May not be available in all regions due to regulatory restrictions.)

13. Click **Finish** to save the Distribution list.

Notes:

- Once a distribution list has been added, the type of data contained in the distribution list may not be changed.

- For Member, Past Member, Visitor and Past Visitor distribution lists if the *Automatically add and maintain entries in list* option is not selected then members added to HandicapMaster at a later date or existing members that are edited and then meet the distribution list selection criteria are NOT automatically added to these distribution lists, but may be added manually.

- Only 'Members', 'Past Members', 'Visitor' and 'Past Visitor' types of distribution list are available when sending letters.

- The Bookings facility is available in the Gold editions of HandicapMaster. Group Bookings are only available with those editions.

- If the *Automatically add and maintain entries in list* option is selected then HandicapMaster will update the distribution list automatically under the following situations:

    1. When you view the distribution lists

    2. When you send e-mails

    3. When you start the Letter Writer.

8.4.5   Delete a Distribution List

To delete a Distribution List in HandicapMaster

1. Do one of the following:

    - On the **Players** drop-down menu, click **Distribution Lists**

    - On the Task/Explorer tab, click **Explorer** and then , then select **Distribution Lists**.

    Existing Distribution Lists are displayed.

2. Highlight the list you wish to delete. Then delete the list using one of the following:

    - Select **Delete a List** from the Distribution Lists Tasks

    - Right click with the mouse and select **Delete List**

    - Press the DELETE key on the keyboard.

3. Confirm the deletion.

8.4.6 Add to Entries in a Distribution List

Note the following instructions do **NOT** apply to distributions lists where the **Automatically add and maintain entries in list** option is selected.

To add an entry to a Distribution List

---

1.   Do one of the following:

   • On the **Players** drop-down menu, click **Distribution Lists**

   • On the Task/Explorer tab, click **Explorer** and then , then select **Distribution Lists**.

   Existing Distribution Lists are displayed.

2.   Highlight the list you wish to add entries to and press ENTER Key, or double click the appropriate list.

   The list of current entries in the Distribution List will be displayed.

3.   Select **Add an Entry** from the **Distribution Lists Tasks** or press the INSERT key to add a new entry to the Distribution List.

4.   Select the entries you wish to add by ticking the box to the left hand side of their name. Then click **OK**.

Notes:

• The entries that may be selected will be different depending on the type of distribution list.

• For Golf Club distribution lists only clubs with contact details will be listed in the entries that may be added.

• For Group Bookings distribution lists only Group Bookings where an organiser's e-mail address was supplied will be listed.

• The entries window may be resized to make it easier to view large lists of entries.

• Click on the column header to sort the entries by that column. Click the column header a second time to reverse the sort order.

• You may remove existing entries by removing the tick against their name.

8.4.7 Remove Entries from a Distribution List

Note the following instructions do **NOT** apply to distributions lists where the **Automatically add and maintain entries in list** option is selected.

To remove an entry from a Distribution List

---

1.   Do one of the following:

   • On the **Players** drop-down menu, click **Distribution Lists**

   • On the Task/Explorer tab, click **Explorer** and then , then select **Distribution Lists**.

   Existing Distribution Lists are displayed.

2.   Click on the entry in the list to highlight them.

3. Do one of the following:

- press the DELETE key

- right click and select **Remove Entry**

- select **Remove an Entry** from the **Distribution Lists Tasks**

4. Confirm the removal.

<div style="background-color: #fffdd0; padding: 4px;">

To remove all entries from a Distribution List

</div>

Note the following instructions do **NOT** apply to distributions lists where the **Adjust Distribution List automatically** option is selected.

1. Do one of the following:

- On the **Players** drop-down menu, click **Distribution Lists**

- On the Task/Explorer tab, click **Explorer** and then , then select **Distribution Lists**.

  Existing Distribution Lists are displayed.

2. Highlight the list you wish to removal all entries from

3. Do one of the following:

- Select **Remove all Entries** from the **Distribution Lists Tasks** or

- Right click with the mouse and select **Remove all Entries** in the pop-up menu**.**

3. Confirm the removal of all entries. The distribution list will remain but have no entries.

<div style="background-color: #fffdd0; padding: 4px;">

Notes:

</div>

- To remove all the entries and the distribution list delete a distribution list.

8.4.8   Edit details of Entries in a Distribution List

<div style="background-color: #fffdd0; padding: 4px;">

To edit the details of an entry in a Distribution List

</div>

1. Do one of the following:

- On the **Players** drop-down menu, click **Distribution Lists**

- On the Task/Explorer tab, click **Explorer** and then , then select **Distribution Lists**.

  Existing Distribution Lists are displayed.

2. Highlight the list you wish to select and press ENTER Key, or double click the appropriate list.

   The list of current entries in the Distribution List will be displayed.

3. Double click the entry to be edited or right click and select **Edit Entry**

4. Edit the details of entry. Then click **OK**.

<table>
<tr><td>**Notes:**</td></tr>
</table>

- For Golf Club distribution lists you may change the contact details.

- For member and visitor related distribution lists you can edit the member or visitor details.

- For 'Other Recipient' lists you may edit the name and e-mail address. Names need to be unique.

8.4.9 Address Labels from a Distribution List

Address labels may be produced for 'Members', 'Past members', 'Visitors', 'Past visitors' and 'Golf club' distribution lists.

These labels may be printed to sheets of labels and then placed on envelopes removing the need for windowed envelopes.

Note.

The facility to print Address Labels is included in the Gold of HandicapMaster.

<table>
<tr><td>**To produce address labels from a Distribution List in HandicapMaster**</td></tr>
</table>

1.   Do one of the following:

- On the **Players** drop-down menu, click **Distribution Lists**

- On the Task/Explorer tab, click **Explorer** and then , then select **Distribution Lists**.

    Existing Distribution Lists are displayed.

2.   Highlight the list from which you wish produce address labels.

3.   Do one of the following:

- Select **Address Labels** from the **Distribution Lists Tasks** or

- Right click with the mouse and select **Address Labels**

    If you have selected a Member, Past Member, Visitor or Past Visitor distribution list then the option to limit the address labels to those members without an e-mail address will be offered. Click **Yes** to accept this option.

3.   Choose the type of Label you will be using in the **Label Type** box.

4.   In the **Start at Label** boxes, select a **Row** and **Column** where the labels are to be printed from. This can be useful if a partially used page of labels is to be re-used, as it allows position of used labels to be skipped. Not applicable where labels on rolls are being used.

5.   Click **OK**.

Chapter

9

Setting System-wide Options

9 Setting System-wide Options

9.1 Introduction

Settings which can be changed which affect the overall operation of HandicapMaster

You should consider the following 'global' options which affect the operation of HandicapMaster. This Chapter describes these options, which are

1. Setting which club is considered the 'System Home Club'.

2. Setting the Font used in HandicapMaster screens.

3. Identification of Signatory on Letters.

4. Addressing, Titling and Contact information on Press Release reports.

5. Database configuration

6. Automatic backups (Where database is on-premises)

Contents

- Setting global options.

- Changing the system password

- Changing the Competition Score Entry Administration Area password

- Accounting Options

9.2 Global Options

<div style="background-color:#FFFFCC">

To amend a Global Option

</div>

1.   On the **File** menu, click **Options**

The options are categorised into 'pages' accessed by clicking an appropriate 'Tab'.

System Home Club Tab

System Home Club

Change Home Club

This allows you to explicitly choose the club that will be recognised as your Organisation's Home Club. Any member who has this club as their own Home Club (in their Membership record) will be a Home member for your organisation.

General Tab

Start up in this Folder

Choose which Folder should be displayed when HandicapMaster is first started.

Tick the **Small icons and narrow line spacing used in Lists** box if you would rather the information shown in lists is displayed as smaller icons and narrower lines (that is, more lines on screen).

Click the **Set Columns to Default order in Lists** to reset the ordering of the columns in the various lists that are displayed by HandicapMaster.

Golf Courses

 May not be available in all regions due to regulatory restrictions.

Choose whether to record length of holes (Yards or Metres) when entering course details. If selected, any distances entered will be included in the 'Scorecards for a Competition' report. It is optional whether length of holes are recorded.

Membership Tab

PIN Numbers
Set the number of digits to be used for Membership PIN numbers. May be between 3 to 6 digits inclusive. PIN numbers are used for selecting names from the Competition Score Entry list when using a Keypad or terminal in place of a Keyboard.

Allocate Visitor PIN numbers in range:
Select the range of PIN numbers that should be used for Visitors. This may be especially useful when HandicapMaster is [linked to other membership systems](#).

Note: If this range is changed and there are visitors with their PIN outside this range or or Members with their PIN in the new Visitor range the option to "Adjust Members and Visitor PINS to take account of the new Visitor PIN range" is offered.

Warn when Members share a PIN Number
Sets whether a warning message is displayed when a member record shares a PIN number with another player.

Set PIN numbers to current Membership numbers
Allows the PIN numbers for current members to be set the same as their Membership Numbers

(where possible). The Membership numbers must be numeric and not using more digits than *previously saved* using **PIN Numbers** option. If the Membership number of a player has already been used as a PIN number for a Visitor, then the PIN Number for the member will *not* be set.

Adjust age groups automatically
Tick this box if you wish HandicapMaster to automatically adjust a member's age group automatically. This will then allow you to select the basis which should be used to adjust the age group of members automatically.

Adult From Age
Set the age from which a member is considered an adult. This age is used when Members are added manually or automatically loaded or imported into the database to set the appropriate 'Age Group' of the member to Adult, provided that a Date Of Birth is supplied for the member.

On

If **Adjust age groups automatically** is ticked then select either **Date** or **Birthday**. If **Date** is selected please select the day and month within the year that you wish age groups of members to be updated. If Birthday is selected then the member's birthday will be used. The first time HandicapMaster is run on or after the selected criteria it will automatically check member's date of birth and if the member's age group should be changed to **Adult** this will occur.

Senior From Age
Set the age from which a member is considered a senior. This age is used when Members are added manually or automatically loaded or imported into the database to set the appropriate 'Age Group' of the member to Senior, provided that a Date Of Birth is supplied for the member.

On

If **Adjust age groups automatically** is ticked then select either **Date** or **Birthday**. If **Date** is selected please select the day and month within the year that you wish age groups of members to be updated. If Birthday is selected then the member's birthday will be used. The first time HandicapMaster is run on or after the selected criteria it will automatically check member's date of birth and if the member's age group should be changed to **Senior** this will occur.

Title of Age Group
You may name two of the Age Groups used by HandicapMaster by entering their titles in these boxes.

User-Defined Fields
You may name each of the 'User-defined' fields in the membership records. You can also delete data stored in the user defined fields in the database by clicking on the appropriate button. This will delete the data for all members in the database for the selected user-defined field.

Letters Tab

Add Letterhead to Letters
This section allows you to configure HandicapMaster to automatically generate a Letterhead on any Letter that is created. If selected, the Letterhead will consist of the Club name on the top line and two additional lines as entered in the **Address Line 1** box and **Address Line 2** boxes.

Include picture in heading
HandicapMaster may be configured to include a graphic (picture) in the title of all of its reports and letters. This allows organisations to include their motif or emblem in the reports or letters.

Tick the **Include picture in heading** box to include the picture in the letter heading.

The picture, if included, is by default placed on the right hand side of the letter heading. To align the graphic to the left hand side tick the **Align Picture Left** box.

Tick the **Use full name in recipient address** box to include the full name of the recipient in the recipient address section of the letter. If this option is not selected the recipient name will be composed of the first letter of the recipients name , middle initials and surname.

Layout
Click the **Layout** button to set the positioning of the Address, date and body of the letter details on the printed page. This may be useful to avoid overprinting any text on pre-printed Letterheads. You may also **Set Font to use for address and date**.

Salutation
Click the **Salutation** button to choose the format of the recipient's name on the "Dear..." line in the letter. You may also **Set Font to use for salutation line**.

Signatory on Letters
This section allows you to pre-set the name of the signature to be put to the bottom of Letters. Such as Letter of Introductions and Handicap Certificates (May not be available in all regions due to regulatory restrictions.) when sent by e-mail.

Competitions Tab

Competitions
Tick the **Use strokes taken for gross results in Stableford and Par competitions** box if you wish the Gross Scores (I.e. No Handicap Allowance) results to be based on the number of strokes taken, even if the competition format is Stableford or Par. If this box is not ticked, the Gross Scores results will be based on the number of Stableford points won (without handicap) or Par result (without handicap) accordingly. When this setting is changed, it is applied to all Stableford and Par competitions that are currently opened.

Tick the **Cursor moves down before across when entering multiple column scores onto scorecard** box if you wish to change the way scores are entered for team competitions where more than one column of scores have to be entered (such as with Four-Ball competitions). When this box is ticked, scores for Player A have to be entered before any scores for Player B, etc. That is, the cursor moves down column-by-column, rather than across row-by-row. After changing this option, reselect Enter Competition Scores or restart Player Entry system for the change to take affect.

Tick the **Enable export of scores to Spanish Golfdirecto service** box if you wish to be able to export start sheet times and also competition scores from HandicapMaster and import these into the Golfdirecto system.

Press Release
This section allows you to set titling and contact information on the heading of Press Release reports.

Competition Fees
Tick the **Use Set Folder and File Names when Exporting Competition Fees** box if you are intending to use the Manage Competition Fees option and wish HandicapMaster to create export files in the same folder (without prompting for a file name each time). Click Folder button to select the folder where the files shall be created.

Export files will be named "Comp_Fees_Sales_yyyy_mm_dd_nn.csv" or "Comp_Fees_Refunds_yyyy_mm_dd_nn.csv" depending whether unprocessed fees payable or unprocessed refunds are being exported (where yyyy_mm_dd is the date the file is created and nn a sequence number from 01 upwards for that day).

Tick the **When reporting fees payable, include players' competition handicaps and divisions played in** box if you wish to extend the fees payable report and export file to include the handicap and competition division for each player. The division is reported as 0 when divisions have not

been used for the competition. Note: This option is not available in all editions of HandicapMaster.

Database Tab

Show Description in Title Bar
Enter a Description for this database in the **Show in Title Bar** box, if you would like to differentiate between more than one copy of HandicapMaster running on the same PC. The text will be displayed in the Title Bar of the main HandicapMaster window.

Configure...
This button, if clicked, will allow additional copies of the HandicapMaster database to be created or copied.

Compact Database *This is only available where database is on-premises and not SQL Server database technology.*
This button, if clicked, will compact the current HandicapMaster database file , often reducing it in size.

Recover the database to how it was at an earlier date using an automatic Backup *This is only available where database is on-premises*
This link, if clicked, will allow the HandicapMaster database to be restored back to a previous position using one of the 'automatic' backups that HandicapMaster maintains.

Create an automatic Backup now *This is only available where database is on-premises*
This link, if clicked, will request that HandicapMaster takes an immediate backup of the database, as an 'automatic' backup.

Number of Automatic backups retained *This is only available where database is on-premises and not SQL Server database technology.*
HandicapMaster will save a copy of the database each time HandicapMaster is exited. The copies are made to directory \Backup under the HandicapMaster directory.This number dictates how many copies should be retained. Valid values are 0 to 99 inclusive.

Notifications Tab
Show me notifications for

- **Old HandicapMaster software found on PC**
  This displays a notification advising that the older version 8 software has been identified as installed on the PC. Click the message to display an option to uninstall the older software.

- **E-mail Rejections** (For users of the HandicapMaster e-mail service only.)
  This displays a periodic notification to review the E-mail Rejections report. We recommend that the report is checked regularly to see if any rejected e-mail addresses etc are no longer valid.

Integration Tab (Gold editions only)

Configure Integration...
This button allows configuration of interfaces to and from other systems.

This facility should only be changed after discussion with the supplier of your external Membership system.
Note this is only visible when logged on as the HandicapMaster "admin" user.

Report Account ID's
This button, if clicked, will create a text file listing the Account ID's currently used in the membership records in the database.

Edit Member's Account ID

This button, if clicked, will allow for the viewing and editing of a Current Member's Account ID in the database.

Edit Past Member's Account ID
This button, if clicked, will allow for the viewing and editing of a Past Member's Account ID in the database.

Bookings Tab (Gold editions only)

Bookings are received through
Tick this box if you have an account with BRS Golf, , MyTeeTime, eTeeSheet or Tee Times 4 You for online bookings.

and wish to be able to import competition bookings to a Start Sheet from these systems. See Import Competition Bookings onto a Start Sheet for further details.

- If using BRS Golf, enter your BRS Golf **Site code** into the section provided. **Folder**, **Username** and **Password** fields are required if uploading membership details to BRS.

- If using MyTeeTime, enter your MyTeeTime Club Code.

- If using eTeeSheet, enter your eTeeSheet account reference.

- If using Tee Times 4 You, enter your Tee Times 4 You account reference.

If you wish to be able to import competition bookings to a Start Sheet from these systems, tick **Competition Bookings may be imported onto Start Sheets from** box. See Import Competition Bookings onto a Start Sheet for further details.

If you wish to be able to upload Membership records to the booking service, tick **Membership updates may be uploaded to** box. Menu item **Publish to ... Tee Booking** will be added to the **Players** drop down menu the next time your start HandicapMaster.

Unless you have ticked the **Competition bookings may be imported onto Start Sheets from** box (in which case bookings are turned off in HandicapMaster), you may configure options relating to bookings received through HandicapMaster and Player Entry.

Configure Bookings
Click this button to configure the bookings service.

If you do not have one of the above accounts then bookings will be either through Player Entry screens or through the Master Scoreboard web site simultaneously (i.e. players can book in the clubhouse or online).
Note: Requires Master Scoreboard to be set up for "individual passwords", so each member log's in with their own password on the web site.

9.3   Accounting Options

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

The Accounting Options allows you to configure and adjust accounting options for your organisation.

To amend an Accounting Option

1.   On the **Accounting** menu, click **Options**

Note:
This item is only available when the Subscriptions Option has been installed as a licenced option.

Value Added Tax
This section is used to configure the VAT details of your organisation.

Tick the **Use VAT** box if your organisation is registered for VAT.

In the **VAT Number** box enter your organisation's VAT number, this will be printed on receipts and invoices.

In the **VAT Rate (%)** box enter the current VAT Rate.

Subscriptions and Invoices
This section is used to configure options related to Subscriptions and invoices

Tick the **Print Raised Invoices Automatically** box to turn on the automatic printing of an invoice when an invoice is raised.

Tick the **E-mail Raised Invoices** box to turn on the e-mailing of an invoice when an invoice is raised.

In the **Days before an Invoice or Subscription is Overdue** box enter the number of days grace before an invoice or subscription is considered to be overdue. The default value is 30 days.

In the **When raising subscriptions allow voiding of unpaid subscriptions raised within the last days** box you may enter the number of days that HandicapMaster will check back in time and automatically allow you to void any unpaid subscriptions when raising new subscriptions. This may be useful where you have recently conducted a subscription run, and then realised that some changes to subscriptions are required and you wish to void these incorrectly raised subscriptions.The default value is 45 days.

Tick the **Prompt for confirmation when adding members to a start sheet if their subscription is overdue** box if you wish the subscriptions option to determine if players being added to the start sheet have an overdue subscription. In this case HandicapMaster will prompt if the player should be added to the start sheet.

By default the **Cancel un-paid subscriptions and invoices when deleting members** will be ticked.

When using the Subscriptions Option to manage competition fees if you wish to retain resigned member's account balances as they were just prior to their resignation then un-tick this box.

The option **Include 'Amount Due' in subscription lists** allows you to include the amount due when displaying the **Subscriptions in Current Accounting Year** or **All Subscriptions**

lists. The Default is to have this enabled, but it can increas the time takes for these lists to be displayed.

Receipts

This section is used to configure options related to Receipts

> Tick the **Automatically Print Receipt for Payment Transactions** box to turn on the automatic printing of receipts for financial transactions.

> Tick the **E-mail Receipts** box to turn on the e-mailing of receipts for financial transactions.

> In the **Footnote to add to Receipts** box enter any text that you wish to add to the end of a receipt.

Notes:

- If the rate of VAT is changed then adjust the VAT Rate (%) value. The new value will be used in all future subscriptions, invoices etc. Existing records will use the historic value.

- If VAT is not enabled then Various lists and reports will not include VAT and NET details. Only the GROSS amount will be included.

- If you wish the Invoices or subscriptions to be overdue immediately from the date of issue, then please set the Days before an Invoice or Subscription is Overdue to be 0, before raising invoices or subscriptions.

- The receipt footnote text will be added to all receipts until you edit or delete the text.

- When E-mailing subscriptions, Invoices and Receipts account will be taken of individual member setting to receive such information by e-mail. If this is not set then that member will NOT receive any such correspondence by e-mail.

Chapter

10

Userids and Passwords

10   Userids and Passwords

10.1   Introduction

Users may be configured to HandicapMaster to grant access to all or some of the features of HandicapMaster.

Contents

- About Users and Access

- Properties of a User

- Types of Access

- Custom Access categories

- Add a User

- Copy (duplicate) a User

- Remove a User

- How to change the Access granted to a User

- Changing the Password

- Changing the Competition Score Entry Administration Area password

- Specifying User and Password on Command Line

- Viewing User activity

10.2 Users and Access

10.2.1 Users and Access

You may set-up and configure separate Users to HandicapMaster, giving people varying access to the facilities and data in HandicapMaster.

Tick the **Users must enter a User Name and Password to use HandicapMaster** box if you wish users to be required to log on to HandicapMaster when starting HandicapMaster. In order for different Userids to be used, it is necessary to request Users log on to HandicapMaster.

Click the **Add...** button to add a new User to HandicapMaster. Enter the User name, Description and Access rights in the User Properties window.

Highlight a User in the **HandicapMaster Users** list and click the **Copy** button to copy (duplicate) a User.

Highlight a User in the **HandicapMaster Users** list and click the **Remove** button to remove a User from HandicapMaster.

Highlight a User in the **HandicapMaster Users** list and click the **Properties...** button to change the User Name, Description or Access for a User.

Highlight a User in the **HandicapMaster Users** list and click the **Change Password** button to set or change the password for a User.

Notes:

- If Users are not asked to log on, the ADMIN user will always be used.

- The Remove and Properties buttons are not available for the ADMIN user, which is a built in User.

- To clear a password, select the User and enter a blank Password into Set Password option.

- Hosted and Cloud editions of HandicapMaster must require users to log into the system.

See Also

- Properties of a User

- Types of Access

- Custom Access categories

- Add a User

- Copy (duplicate) a User

- Remove a User

- How to change the Access granted to a User

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- Changing the Competition Score Entry Administration Area password

- Specifying User and Password on Command Line

- Viewing User activity

10.2.2 Properties of a Userid

The following Properties of a User Account may be chosen:

User Name

The Name the Userid.
Use this Name to log on with this Userid.

Description

A description of the User account, such as the full name of the User.

User is Active (may be used to Log on)

Whether this Userid may be used to Log on to HandicapMaster.

Access
There are three types of user accounts available in HandicapMaster: Full, Guest and Custom:

Edit Users and their properties
Whether this Userid may edit the list of Users and their access properties.

View players' personal data (GDPR)
Whether this Userid may view the personal data (Address, Telephone Numbers, E-Mail Address) of players in the system.

> **See Also**

- About Users and Access

- Types of Access

- Custom Access categories

- Add a User

- Copy (duplicate) a User

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- How to change the Access granted to a User

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10.2.3 Types of Access

There are three types of user accounts available in HandicapMaster: Full, Guest and Custom:

Full

The User has full access to all facilities in HandicapMaster. The User may add, amend or delete any data or settings in the system.

Men's Records

The User has full access to all facilities in HandicapMaster, but their view is limited to men's records

only. Only men's records are displayed in the All Members list and associated lists. Only men's competitions (and mixed competitions), templates, etc, are displayed in the competitions lists.

Note: When entering scores for a mixed competition, then ladies' records will be visible.

Ladies' Records

The User has full access to all facilities in HandicapMaster, but their view is limited to ladies' records only. Only ladies' records are displayed in the All Members list and associated lists. Only ladies' competitions (and mixed competitions), templates, etc, are displayed in the competitions lists.

Note: When entering scores for a mixed competition, then men's records will be visible.

Guest Access

The User may view all data and reports in HandicapMaster, but may not amend any data or settings.

Custom Access

The User is granted a mixture of access rights to different facilities in HandicapMaster. The user may Update, View or be granted No Access to each of the subjects in HandicapMaster. Read about Custom Access rights

---

See Also

- About Users and Access

- Properties of a User

- Custom Access categories

- Add a User

- Copy (duplicate) a User

- Remove a User

- How to change the Access granted to a User

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10.2.4 Custom Access

With Custom access, the User is granted a mixture of access rights to different facilities in HandicapMaster. The user may Update, View or be granted No Access to each of the facilities in HandicapMaster.

Some of the following items may not available due to regulatory restrictions.

Facilities restricted by Access Categories (minimum access required shown in brackets)

System Utilities Category

- Change Licence Key (HELP menu, ABOUT HandicapMaster) [Update]

- Backup HandicapMaster Database [View]

- Restore HandicapMaster Database [Update]

- Check for Updates Online: the option 'Check for Program Updates when HandicapMaster is started.' [Update]

- Send Diagnostic Files to Support from another PC [Update]

Configuration Category

- Change Options (FILE menu) [Update]

- Change Layout and Options (REPORTS menu) [Update]

Men - Members or Ladies - Members Category As Applicable

- View Member Records [View]

- Add New, Edit or Delete Member Records [Update]

- Undelete Members [Update]

- Change Members to Visitors [Update] (also requires Visitors [Update] access)

- Suspend Player from Competitions

Membership Utilities Category

- View Membership Categories, Subscription Categories and Officer Position Titles [View]

- Add, Edit or Delete Membership Categories, Subscription Categories and Officer Position Titles [Update]

- Manage Distribution Lists [Update]

- Import Member Records [Update]

- Export Member Records [View]

- Clear Subscription Payments [Update]

- Publish to BRS Online Tee Booking [update]

Visitors Category

- View Visitor Records [View]

- Add, Edit or Delete Visitor Records [Update]

- Find Player on WHS Platform [View]

- Update Visitors from WHS Platform [Update]

- Change Visitors to Members [Update] (also requires Members (Men or Ladies) [Update] access)

Publish to Internet Category

- Publish to Master Scoreboard [Update]

- Publish to WHS Platform [Update]

- Publish to MyGolfRanking [Update]

Accounting Category (Available when Subscriptions Option installed)

- View Subscription [View]

- Print Subscription [View]

- View Invoice [View]

- Print Invoice [View]

- View Payment [View]

- Print Receipt [View]

- (All other Accounting Menu items [Update])

- Housekeeping (of accounting data) [Update]

Men - Handicapping or Ladies - Handicapping Category As Applicable

- Allocate an initial Handicap for a player [Update]

- Download Load Latest Members Handicaps [Update]

- View Handicapping Reports [View]

- Create Handicap Certificate [View]

- Enter a Handicap Note [Update]

- UNDO Handicapping Event [Update]

- Housekeeping (FILE menu) [Update]

Handicapping Utilities Category

- Configure Layout of Handicap List [Update]

- Suspend/Restore Handicaps [Update]

- Housekeeping [Update]

Golf Courses Category

- View Course Details [View]

- Add, Edit or Delete Course Details [Update]

- View Golf Course Contact Details [View]

- Add, Edit or Delete Golf Course Contact Details [Update]

- Add a New Club [Update]

- Delete a Club [Update]

- Edit a Club [Update]

- Rename 'Other' Region [Update]

Men - Competitions or Ladies - Competitions Category As Applicable

- View Competition Reports [View]

- Add, Edit or Delete Competition Templates [Update]

- Open a New Competition [Update]

- Create a Start Sheet [Update]

- Enter Competition Scores [Update]

- Apply Competition Scores [Update]

- UNDO Competition [Update]

- Knock-out Draws [Update]

- Knock-out Matchplay Results [Update]

- Re-configure opened competition [Update]

- Change Closed Competition Name [Update]

- Change Ladies Status of Closed Competition [Update]

- Change whether include Closed Competition on Master Scoreboard [Update]

- Edit or Cancel a Scorecard [Update]

- Cancel an Open Competition [Update]

- View Best of Series report [View]

- Best-of Series [Update]

Men - Bookings or Ladies - Bookings Category (As Applicable)

- Add, Edit or Delete Competition Booking Templates [Update]

- Create new bookings arrangements for a competition [Update]

- View Competition Bookings [View]

- Add, move or remove players from competition bookings [Update]

- Re-configure or cancel bookings arrangements for a competition [update]

- View Bookings reports (Bookings Received, History of Bookings, Online Payments) [View]

- View competitions listed on Bookings Calendar [View]

Bookings (Groups) Category (As Applicable)

- Add, Edit or Delete Group Bookings [Update]

General Bookings Category (As Applicable)

- Add, Edit or Delete General Bookings Facilities [Update]

- Add, Edit or Delete General Bookings Templates [Update]

- Add, Edit or Delete General Bookings Schedules [Update]

Eclectics/Order Of Merit Category

- Eclectic Results [Update]

- Number of 'Good' Holes Played [Update]

- Order of Merit [Update]

Player Entry Category

- Create, edit and delete Settings Profiles [Update]

- Run Player Entry from HandicapMaster [Update]

- Administration Button Password [Update]

- Create, edit and delete Player Entry Messages [Update]

- Clear Player Entry Profile Assignments [Update]

Email Category

- Create, edit and delete Email Settings and send Email (FILE menu and Report toolbar) [Update]

- Send E-mails (FILE menu and Report toolbar) [View]

- Prevent all e-mail access [No Access]

Stripe Payments Category

- View Payments received [View]

- Sign-up to Stripe Payments through Master Scoreboard [Update]

- Delete Stripe Account [Update]

- Refund Payment [Update]

See Also

- About Users and Access

- Properties of a User

- Types of Access

- Add a User

- Copy (duplicate) a User

- Remove a User

- How to change the Access granted to a User

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- Specifying User and Password on Command Line

- Viewing User activity

10.3 Add a User

To add a User to HandicapMaster

1.   On the **File** menu, select **Users**

2.   Click **Add...** button

3.   Select the Properties for this User

See Also

- About Users and Access

- Properties of a User

- Types of Access

- Custom Access categories

- Copy (duplicate) a User

- Remove a User

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10.4   Copy a User

To create a copy (a duplicate) of a User

1.   On the **File** menu, select **Users**.

2.   Select a User in the **HandicapMaster Users** list, to be copied.

3.   Click **Copy** button.

See Also

- About Users and Access

- Properties of a User

- Types of Access

- Custom Access categories

- Remove a User

- How to change the Access granted to a User

- Changing the Password

- Changing the Competition Score Entry Administration Area password

- Specifying User and Password on Command Line

- Viewing User activity

10.5   Remove a User

To remove a User from HandicapMaster

1.   On the **File** menu, select **Users**

2.   Select a User in the **HandicapMaster Users** list

3.   Click **Remove** button

Notes:

• The ADMIN user may not be removed

  It is not possible to remove the User who is currently logged on.

See Also

• About Users and Access

• Properties of a User

• Types of Access

• Custom Access categories

• Add a User

• Copy (duplicate) a User

• How to change the Access granted to a User

• Changing the Password

• Changing the Competition Score Entry Administration Area password

• Specifying User and Password on Command Line

• Viewing User activity

10.6   Change the Access Granted to a User

To change the access granted to a User

1.   On the **File** menu, select **Users**

2.   Select a User in the **HandicapMaster Users** list

3.   Click **Properties** button

4.   In the **Access** box, select *Full* access, *Guest* access or *Custom* access.

5.   Tick **Edit Users and their properties** if this user can manage the users on the system.

4.   Select whether this User may **view players' personal data (GDPR)**.

See Also

- About Users and Access
- Properties of a User
- Types of Access
- Custom Access categories
- Add a User
- Copy (duplicate) a User
- Remove a User
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10.7 Changing the Password

The Password is the password that must be entered on the opening screen in order to gain access to HandicapMaster.

To change the Password

1. On the **File** menu, click **Change Password**.

2. In the **Old Password** box, type the current (existing) password, if one exists.

3. In the **New Password** box, enter the new password.

4. In the **Confirm New Password** box, repeat the new password.

5. Click **OK**.

Note

The following rules apply to Passwords:

- Passwords must be at least 4 characters long

- Any character, number or symbol can be used

- Passwords are case sensitive in the HandicapMaster *Hosted* and *Cloud* editions, but not case-sensitive in other editions.

Requiring Users to Logon to HandicapMaster

It is necessary to require Users to logon on to HandicapMaster, in order for a Userid and password to be prompted at Start-up. To set this

1. On the File menu, click Users.

2. Tick the Users must enter a User Name and Password to use HandicapMaster box.

Note

- HandicapMaster *Hosted* and *Cloud* editions always require users to log in.

To Remove (clear) the Password

It is possible to reset or remove the password by:

1. In the **Old Password** box, type the current (existing) password, if one exists.

2. Clear (leave empty) the **New Password** and **Confirm New Password** boxes.

Note

- HandicapMaster *Hosted* and *Cloud* editions always require users to log in.

To reset a User's Password

1. On the **File** menu, click **Users**

2. Highlight a User in the **HandicapMaster Users** list

3. Click **Change Password** button.

If you have lost the Password

In the event of a lost or forgotten password, please contact the supplier.

See Also

- About Users and Access
- Properties of a User
- Types of Access
- Custom Access categories
- Add a User
- Copy (duplicate) a User
- Remove a User
- How to change the Access granted to a User
- Changing the Competition Score Entry Administration Area password
- Specifying User and Password on Command Line
- Viewing User activity

10.8 Specifying User and Password on Command Line

The following command line options may be used to preset the Username and/or password to be
used when starting the program:

Switch	Function
/usr \<name\>	Specifies the Username to be used
/pwd \<password\>	Specifies the Password to be used

For example, the following command line starts HandicapMaster, logging in as user *FRED* and
password *MyPassword*.

```
"C:\Program Files\HandicapMaster9\HandicapMaster.exe" /usr FRED /pwd MyPassword
```

See Also

- About Users and Access

- Properties of a User

- Types of Access

- Custom Access categories

- Add a User

- Copy (duplicate) a User

- Remove a User

- How to change the Access granted to a User

- Changing the Password

- Changing the Competition Score Entry Administration Area password

- Viewing User activity

10.9   **Viewing User activity**

You may view a log of activity of user's activity through the HandicapMaster system.

To view User activity in the system

1.   On the **File** menu, click **User Activity**.

Note:

To view the log, you must have been granted access to the Users facility in HandicapMaster.

See also

- About Users and Access
- Properties of a User
- Types of Access
- Custom Access categories
- Add a User
- Copy (duplicate) a User
- Remove a User
- How to change the Access granted to a User
- Changing the Password
- Changing the Competition Score Entry Administration Area password
- Specifying User and Password on Command Line

Chapter

11

Reports

11   Reports

11.1   Viewing, Printing, E-mailing and Saving Reports

11.1.1   Introduction

Navigating around the reports windows.

This Chapter describes how to operate the report generator in HandicapMaster.

Contents

- The Reports Toolbar

- Print the Report

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NOTE

A list of reports is available.

11.1.2   The Reports Toolbar

When a report is requested, the report is first 'printed' to the screen within a Reports window. The following Toolbar is displayed along the top of the report.

Report Buttons

On the bar are the buttons as follows:

Button	Type	Description
	E-mail	E-mail the report as a PDF attachment
	Printer	Prints report
	Save	Saves report to file in one of a number of different formats
	Zoom	Zooms in or out of report
	Left Arrow	Displays first page of the report
	Left Arrow	Displays previous page of the report
	Right Arrow	Displays next page of the report
	Right Arrow	Displays last page of the report
	Page Orientation	For many reports you may change the orientation between portrait and landscape. Note some reports are in a fixed orientation in which case this button cannot be clicked.
	Copy Text	Copies the text from the document into the windows clipboard. Use PASTE in Excel to view and work with the text.
	Find Text	Searches for one or more occurrences of some text in the document. It is possible to jump to the page where the text occurs by clicking the entry in the results list.

11.1.3 Print a Report

To Print a Report

You may print the current report by clicking the **Print Report button**   on the Reports Toolbar.

See Also

- Turn off Warnings when Printing Reports

11.1.4 E-mail a Report

To E-mail a Report

1. Generate the report in HandicapMaster, so that it is the currently displayed report.

2. Click the **E-mail Report button**   on the Reports Toolbar.

3. The New Message window will be displayed where you may set-up the e-mail.

The report will be sent as a PDF attachment to the e-mail.

Notes

- The first time that you click the e-mail report button, you will be asked to enter your e-mail settings. These are required to configure HandicapMaster to send e-mail.

- See System Requirements to see if you are able to send e-mails from your computer.

11.1.5 Save a Report to File

To Save a Report to File

You can save the current report to a file by clicking the **Save Report button**   on the Reports Toolbar. This will save the report to a file in your chosen file format. This can be

- Portable Document Format (*.PDF)

- OpenDocument Spreadsheet (*.ODS)

- Word Format (Rich Text Format (*.RTF))

- Comma-separated Values (*.CSV)

To change the default file format used

You may change HandicapMaster so that the default format of file used when saving reports is Word

Format (Rich Text Format (*.RTF)). To do this..

1. On the **Reports** menu, click **Layout and Options**

2. Click the **General** Tab

3. Choose your preferred file format in **Default file format when saving reports** box.

Notes:

- Some formatting information may not be preserved when you save a report to the various formats. This is a limitation of the destination document format.

- Please note that it may take some time ranging from many seconds to a few minutes to save the report to some formats. This is especially true for larger reports.

See also

- Export a report to Microsoft Excel

11.1.6 Change the Size of Report on Screen

To change the size of the report on the screen

You can change the size of the report on the screen by clicking one of the **Zoom buttons**

on the Reports Toolbar, shrinking or enlarging the report on the screen.

Alternatively, enter the percentage size in the applicable box.

See Also

- Opening and Closing the Left Hand Pane

11.1.7 Export a report to Microsoft Excel

You may choose to export a report to Excel (or similar spreadsheet program). Depending upon the information required, you may do this as follows:

Create a spreadsheet with font styles preserved

If you require to create a spreadsheet with the font styles preserved, do the following:

1. Generate the report in HandicapMaster, so that it is the currently displayed report.

2. Click the **Save Report** button   on the Reports Toolbar.

3. Choose a folder to save the report file to, and enter a name for the file. Change **Save as Type** box to '**OpenDocument Spreadsheet (*.ods)**' and click **Save**.

4. You will be offered the option to view the file created in your spreadsheet program.

Notes

- The OpenDocument format is supported in Microsoft Office 2010 and later versions of Microsoft Office. It is also supported by a number of other Office suites.

- The font styles and data from the report will be included in the spreadsheet, but other formatting such as borders and columns widths, etc, will not be set.

Create a spreadsheet with just data from the report

If you just require to export the data from the report into a spreadsheet, do the following:

1. Generate the report in HandicapMaster, so that it is the currently displayed report.

2. Start a new spreadsheet in your spreadsheet program.

3. Click the **Copy Text from Document** button on the Reports Toolbar.

4. Switch to your spreadsheet program and select **Paste** (Eg. Press CTRL + V keys together).

11.2 Customising Reports

11.2.1 Introduction

Settings which can be changed to affect the appearance of reports.

This chapter describes settings which affect the appearance of reports.

Contents

- [Customising appearance of Reports](#)
- [Add a Club Logo to Reports](#)
- [Remove a Club Logo from Reports](#)
- [Configure layout of Handicap Certificate](#)
- [Configure layout of the](#) Handicap [List report](#)
- [Configure 'Most Improved Golfer' report](#)
- [Configure 'Competition Results' Report](#)
- [Change the default file format used when saving reports](#)
- [Change the way a member's name is displayed in reports](#)
- [Turn off Warnings when Printing Reports](#)
- [Configure how 'Plus' Handicaps are exported](#)

11.2.2 Customising appearance of Reports

The appearance of reports may be customised. Customisation includes choosing fonts to be used in selected areas of reports (such as headings), adding a graphic to the report, etc.

To customise the appearance of reports,

1. On the **Reports** menu, click **Layout and Options**

Customisation is achieved by setting the attributes of how items of text are to be displayed. These items of text are called 'categories'.

To change the Font used for a category

1. Click the **Fonts** tab,
2. In the **Choose a Category** list, choose the category of text you wish to customise,
3. Click the **Fonts Settings**. . . button and change the settings.

To change the Background colour for the category

1. Click the **Fonts** tab,
2. In the **Choose a Category** list, choose the category of text you wish to customise,
3. Click the **Background Colour. . .** button and choose the colour.

To set or remove a border around the text in a category

1. Click the **Fonts** tab,

2. In the **Choose a Category** list, choose the category of text you wish to customise,

3. In the **Category Border** list, Choose a border style. To remove a border, select 'None'.

4. To set the colour of how a border is displayed, click the **Change. . .** button and choose the colour.

5. To set the thickness of border lines, enter a width in the **Width** box.

Note

Some border settings are not retained when saving reports in the Web Page format.

To set a paragraph indent for all text in a category

1. Click the **Paragraphs** tab,

2. In the **Choose a Category** list, choose the category of text you wish to customise,

3. Enter a size of paragraph indent in the **Left** and **Right** boxes. This size is measured in millimetres.

To set spacing before and after paragraphs for all text in a category

1. Click the **Paragraphs** tab,

2. In the **Choose a Category** list, choose the category of text you wish to customise,

3. Enter a size of paragraph spacing in the **Before** and **After** boxes. This size is measured in millimetres.

To reset all attributes for text in a category back to original settings

1. Click the **Fonts** tab,

2. In the **Choose a Category** list, choose the category of text you wish to customise,

3. Click the **Restore to Factory Defaults** button. All font, border and paragraph attributes will be reset back to their original installation settings, for the selected Category.

11.2.3 Add a Club Logo to Reports

HandicapMaster may be configured to include a graphic (picture) in the title of all of its reports. This allows organisations to include their motif or emblem in the reports.

The graphic, if included, is by default placed on the right hand side of the report heading.

To include a graphic in the report headings

1. On the **Reports** menu, click **Layout and Options**

2. Click the **Picture** tab

3. Place a tick in the **Include picture in Report Headings** box and click on **Change Picture ...** to select an image file name containing the graphic to be displayed.

4. To align the graphic to the left hand side tick the **Align Picture Left** box

Notes:

- The graphic file may be:

    •   Windows 'Bitmap' file (extension *.bmp)

    •   Graphics Interchange Format (extension *.gif)

    •   Joint Photographic Experts Group (extension *.jpg, *.jpeg or *.jpe)

    •   Portable Network Graphics (extension *.png)

- The graphic will automatically be reduced in size proportionally to fit into a size 6cms wide and 4cms high. This size is optimised for including in reports.

- The **Align Picture Left** option is a 'per user' setting and may be different for each user id.

- The Logo is centred in the Handicap Certificate. (May not be available in all regions due to regulatory restrictions.) .

11.2.4   Remove a Club Logo from Reports

To remove a graphic from report headings

1.   On the **Reports** menu, click **Layout and Options**

2.   Click the **Picture** tab

3.   Remove the tick from the **Include picture in Report Headings** box.

11.2.5   Configure layout of Handicap Certificate

May not be available in all regions due to regulatory restrictions.

To change the size of the Handicap Certificate

1.   On the **Reports** menu, click **Layout and Options**.

2.   Click the **Handicap Reports** tab.

3.   Under the **Handicap Certificate** section, tick the **Small Certificates (3 per Page)** box to reduce the certificate reports from full page to one third page size.

To choose whether the Club Logo is included in the Handicap Certificate report

1.   On the **Reports** menu, click **Layout and Options**.

2.   Click the **Handicap Reports** tab.

3.   Under the **Handicap Certificate** section, tick the **Include Picture (when available)** box to include the club Logo in the Handicap Certificate.

Note:

- A Logo must have been configured into HandicapMaster previously for it to be included in the Certificate. To configure a Logo, see [Add a Club Logo to Reports](#).
- This option is not available when **Small Certificates** has been selected.

To change the top Margin used for the Handicap Certificate report

1. On the **Reports** menu, click **Layout and Options**.

2. Click the **Handicap Reports** tab.

3. Under the **Handicap Certificate** section, amend the **Top Margin** value to change the vertical positioning of text on the Certificate.

Note:
- This option is not available when **Small Certificates** has been selected.

To change the way Names are displayed on the Certificate

1. On the **Reports** menu, click **Layout and Options**.

2. Click the **Handicap Reports** tab.

3. Under the **Handicap Certificate** section, tick the **Format Names like 'Mr A. N. Other'** box to change the way names are displayed on the Certificate from, for example, *Andrew N. Other* to *Mr. A. N. Other*.

11.2.6 Configure layout of Handicap List

May not be available in all regions due to regulatory restrictions.

Various layouts for the master Handicap List are available. These include selecting whether members without handicaps are included, order of names in the list, use of one or two columns etc.

To change the layout of the Handicap List Report

1. On the **Reports** Menu, choose **Configure layout of Handicap List**.

   Tick the **Members without Handicaps** box, to include non-playing members in the Handicap List. This option is only valid when ordering the report alphabetically within Membership Category (other orderings are based upon value of handicap and therefore members without handicaps cannot be included).

   In the **Include with Names** list, select whether to include in the report players'

   - Membership Numbers,

   - Primary Telephone Numbers, or

   - PIN Numbers.

   These options are restricted when 2 or more columns are used, due to the lack of available space.

   In the **Exclude Membership Category** list, select a category of membership if you wish to exclude these members from the Handicap List.

   It is possible to add your own notes to the bottom on the report by including text in the **Add comments to bottom of the report** box. It is not recommended to go above 200 characters for this section.

   Tick the **Left Justify Names, showing Last name first** box to display names in <Surname, First name> order.

Tick the **Include Page Numbers** box to include Page Numbers in the footer of each page.

In the **Order names in the list** list, select the order for displaying Members. These include

Option	Description
Alphabetical within Membership Category	Members are listed alphabetically by Surname within groups according to their Membership Category.
Alphabetical within Handicap Category	Members are listed alphabetically by Surname within groups according to Handicap Category, as defined within the Handicap Schemes.
By increasing Handicap	Members are listed by increasing Strokes Received (I.e. Exact Handicap within Strokes Received).

In the **Number of Columns** list, choose how many columns to be used for names on each page. When using three columns, it may be necessary to reduce the font size of characters used in the report.

See Customising layout of Reports to amend the font used in the report.

Notes:

Each HandicapMaster User has their own configuration of the Handicap List report.

11.2.7   Configure Most Improved Golfer Report

May not be available in all regions due to regulatory restrictions.

To change how the Most Improved Golfer calculation is performed

1.   On the **Reports** menu, click **Layout and Options**.

2.   Click the **Handicap Reports** tab.

3.   Under the **Most Improved Player Report** section, select either **Use Relative Improvement in Handicap (USGA Method)** , **Use Golf World Ranking**, or **Use Percentage Improvement in Handicap**.

Notes:

- The following formulae are used to calculate the Most Improved Golfer

USGA Method
The improvement ranking is calculated using the following formula:

Ranking = (Original Handicap + 12) divided by (Current Handicap + 12)

This ranking is recommended by the United States Golf Association (see Appendix H of the USGA Handicapping system).

Golf World Ranking
The improvement ranking is calculated using the following formula:

Ranking = (2 x Original Handicap) less (3 x Current Handicap)

Percentage Improvement in Handicap
The ranking is based on a percentage change in Handicap. The following formula is used:

Ranking = ((Original Handicap - Current Handicap) / Original Handicap) x 100

- Members who do not have an 'Original Handicap' prior to the start date selected for the report use the first handicap found after that date.

11.2.8 Configure Competition Reports

Competition Results Report

To enlarge the Font size used in the Competition Results Reports (hiding Countback scores)

1.   On the **Reports** menu, click **Layout and Options**.

2.   Click the **Competition Reports** tab.

3.   Remove the tick in the **Countback Scores (display scores in small font)** box

To configure Total Score as first column in Multiple Round Results

1.   On the **Reports** menu, click **Layout and Options**.

2.   Click the **Competition Reports** tab.

3.   Place a tick in the **Multiple Round Results: Total Score as First column** box

To separate results from each division of the same competition onto a separate page

1.   On the **Reports** menu, click **Layout and Options**.

2.   Click the **Competition Reports** tab.

3.   Place a tick in the **Page breaks between Divisions** box

Report to File

To extract a list of Competitors to CSV file when Applying Scores (Gold Only)

1. On the **Reports** menu, click **Layout and Options**.

2. Click the **Competition Reports** tab.

3. Place a tick in the **Extract a List of Competitors to CSV file when Applying Scores** box

4. Under the **Format** section, select an appropriate value from those listed.

5. Supply the name of the file to which the output is to be written.

11.2.9 Configure Booking Reports

The Bookings facility is available in the Gold editions of HandicapMaster

Prefix membership Number to Competition Bookings report

1. On the **Reports** menu, click **Layout and Options**.

2. Click the **Booking Reports** tab.

3. Tick the **Prefix Membership Number to names on Competition Bookings report** if you wish to include the membership number of members on the **Competition Bookings** report.

Notes

- The membership number will be prefixed to the name.

- The Membership Number will be separated from the name by a hyphen.

- If a member does not have a membership number then only their name will be displayed.

11.2.10 Configure Displaying of Member's Names

You may change HandicapMaster so that the display of member's names in reports is either 'forward or 'reverse'. default. To do this..

1. On the **Reports** menu, click **Layout and Options**

2. Click the **General** Tab

3. Tick the **Names on reports, show last name first reports** box if you wish member's names to be displayed in **Reverse** order

Notes:

- **Forward** order is First Name Middle Initials Surname

- **Reverse** order is Surname, Middle Initials First name

11.2.11 Turn off Warnings when Printing Reports

When you print reports from HandicapMaster, warnings will be displayed if the printer is using paper of a size that does not match the document being printed.

If you find that your printer still manages to correctly print the documents despite this warning, you may turn off the warnings from HandicapMaster. To do this..

1. On the **Reports** menu, click **Layout and Options**

2. Click the **General** Tab

3. Tick the **Silently ignore printer warnings** box.

11.2.12 Configure how 'Plus' Handicaps are exported

When you export data from HandicapMaster, Handicaps that have 'Plus' Handicap values (I.e., are mathematically below zero) are exported like '+2.1'. This can cause problems when viewing the data in spreadsheet applications such as Microsoft Excel, where the Handicap will display as '2.1'

You may change the behaviour of HandicapMaster so that any 'plus' handicap value is exported in a way that Excel will treat as a character string, thus displaying the Handicap as '+2.1'.

Warning: If the handicaps are being exported to CSV file to be read by an alternative program, then adjusting for Excel 'string' format may cause compatibility problems.

To adjust the output of 'Plus' Handicaps:

On the **Reports** menu, click **Layout and Options**

Click the **General** Tab

Tick **Export 'Plus' Handicap values in Excel 'string' format when exporting to CSV file** box.

Note:

This option affects the export of Handicap values in the Player's Export facility and the Start Sheet report export facility (only).

11.3 Viewing Charts

11.3.1 The Charts Toolbar

w hen a chart is requested, the following Toolbar is displayed along the top of the report.

Chart Buttons

On the bar are the buttons as follows:

Button	Type	Description
	Hide / Show	Hide or Show the left hand pane.
	E-mail	Send a copy of the Chart by e-mail.
	Print	Print the current Chart
	Save	Save the Chart to a file
	Copy	Copies the Chart to the Windows Clipboard.
	Left Arrow	Display graph of Previous Player in All Members list
	Players	Select a new player's record to display
	Right Arrow	Display graph of Next Player in All Members list
	Timeframe	Select the timeframe to include in the Graph
	X-axis	Plot the x-axis as a sequence of entries in the Player's Playing and Handicap Record (i.e. with even spacing between each point).
	X-axis	Plot the x-axis showing points relative to the date when they occurred, creating a timeline.

Note Players Playing Record is a record of the players scores at this Club or Society's Icoation.

The Player's Handicap record is the record of the players handicap[entries which may include away scores. May not be available in all regions due to regulatory restrictions.

11.4   Summary of Available Reports

There are 5 main categories of reports within in HandicapMaster.

- Membership

- Competitions

- Bookings

- Handicapping

- Accounting

The Bookings reports are only available in the Gold editions

The Accounting reports are only available when the Subscriptions Option has been installed as a licenced option.

To view a list or the reports with a brief description of each report do the following:

- On the Task/Explorer tab, click **Tasks** and then in the **Places** list in the left-hand column, select the **Reports** item. On the list displayed select one of the tabs

Membership, **Competitions, Bookings, Handicapping** or **Accounting**

A list of the reports and a description will be displayed.

The following is a typical list of the reports available. In some cases some reports may not be available depending on the edition of HandicapMaster. installed. Or may have slightly different names.

Some of the reports listed may not be available in all regions due to regulatory restrictions.

Membership Reports

Report	Description
Membership Summary	Summary of Membership details.
Membership Changes	Number and details of members or visitors added and resigned within a time period.
Membership Contact Summary	List of Member names, telephone numbers and e-mail address.
Officer Contact Summary	List of Official's names, telephone numbers and e-mail address.
Names and Addresses	List of Member's Names and Addresses.
Telephone Numbers	List of Member's Telephone Numbers.
E-mail Addresses	List of Member's E-mail Addresses and how invoices are to be sent.
Membership Category (Alphabetical order)	Alphabetical list of Members and their Membership Category.
Membership Category (Category order)	List of Members and their Membership Category in alphabetical category order.
PIN Numbers (Alphabetical order)	Alphabetic list of Members or Visitors and their PIN numbers used when Players enter their Competition scores.
PIN Numbers (Numeric order)	Numerical list of Members or Visitors and their PIN numbers used when Players enter their Competition scores.

Report	Description
PIN Numbers (Shared)	List of players sharing same PIN numbers.
National ID's Membership Card and PIN Numbers	List of National System ID's, Membership Card numbers and PIN Numbers.
Locker Numbers	List of Members Locker numbers
Notes	Notes entered against Membership Records.
User-defined Notes	Notes entered against membership records in the 'user-defined' fields.
Joining Dates and Category	Dates when Members joined and current membership category.
Anniversary of Joining and Category	Anniversary day in the year the member joined and current membership category.
Renewal Dates	Dates Member's Membership was last renewed.
Expiry Dates	Dates when each Member's Membership next expires.
Age (Alphabetical order)	Alphabetic list of Members with Date of Birth, Age and Age Group assigned to each Member.
Age (Date of Birth order)	List in ascending age order of Date of Birth, Age and Age Group assigned to each Member.
Other Club Membership	List of Members holding a membership at another club.
Names Hidden on Master Scoreboard	List of members with hidden or 'Name Withheld' on Master Scoreboard.
Subscription Paid Dates	Dates when Membership Subscriptions were last paid by each Member.
Subscription Amounts Paid	Amount each member paid for membership (Not available with the Subscriptions Option, see Accounting Reports below for subscription related reports).
Away Members	List of Away Members and their Home Club.
Visitors	List of Visitors.
Distribution Lists	Entries in Distribution Lists.
E-mail Log	Log of E-mails sent.
E-mail Summary Log	Count of e-mails sent by date.
E-mail Rejections Log	List of of recent e-mail transmission rejection errors. (Only available if using HandicapMaster. e-mail service)
Membership Update Problems	Log of any recent errors updating membership records from an external membership system.
GDPR Consent Status	GDPR Consent details for members or Visitors
GDPR (Alphabetical order)	Log of GDPR Activities for members and visitors
GDPR Audit Log (Date order)	Log of GDPR activities by date of activity

Competition Reports

Report	Description
View Competition Results	Results of a Competition.
Analysis of Scores Entered	Analyse scores entered, but not yet processed, for an

(Opened competition)	Opened Competition.
Analysis of Scores Entered (Closed competition)	Analyse scores entered for Closed Competition.
Closed Competitions	Summary of Closed Competitions.
Scorecards from a Competition	Scores entered for each competitor in a Competition.
'No Score Recorded' Scores	Competitions where a player's scorecard was not entered into the system.
Best Scores Analysis	Analysis of best scoring over front/back nines, Par 3's etc. in a Competition.
Competition Scoring Analysis	Analysis of how the Golf Course was played in Competition(s).
Competition Prize Winners	List of the prize winners of competitions.
Countback Scores	Details of scoring used to split ties in competitions where card matching (countback) used.
Players suspended from Competitions	Players currently Banned from entering Competitions.
Player Hole-by-Hole Analysis	Analyse a Players' scores hole-by-hole.
Handicap adjustments at Score Entry	Temporary adjustments made to players' Handicaps for competition purposes only.
Callback Log	Log of transactions with external payment system.
Order of Merit	Runs an Order of Merit ('Golfer of the Year').
Number of 'Good' Holes Played	Number of Birdies (or Pars, or Twos, etc) scored by Players.

Bookings Reports

The Bookings reports are available in the Gold editions.

Report	**Description**
Competition Bookings	Forward booking entries.
History of Bookings (Opened competition)	History of players booking into a currently opened competition.
History of Bookings	History of players booking into a closed competition.
Online Payments Received (Opened Competition)	Details of Online Payments received from entrants into a club Open Competition (currently opened).
Online Payments Received	Details of Online Payments received from entrants into a club Open Competition (now a closed competition).
General Bookings Schedule	Details of bookings received for a selected facility and date.
General Bookings Schedule (Date Range)	Details of bookings received for a selected facility and range of dates.
Confirmation of Reservation	A booking confirmation form for a Group Booking
Forthcoming Group Bookings	List of Group Bookings

(Summary)	
Forthcoming Group Bookings (Detailed)	Full details of future Group Bookings
Catering	Details of reservations with catering requirements.
Fixture List	Report detailing fixtures based on the bookings calendar.
Calendar Note	Details of notes added to the bookings calendar.
Bookings by Member(s)	Details of bookings for one or more members.
Payments Received	When using Stripe Payments system to receive payments, this report provides details of these payments received.
Payments Summary (Monthly)	When using Stripe Payments system to receive payments, this report provides a Summary of Payments received by month.

Handicapping Reports

Report	Description
Handicap List	List of Players' current Handicaps.
Handicap List (Selected Range of Handicaps)	List of Players' current Handicaps, limited to a selected range.
Handicap List (Previous Date)	List of Players' current Handicap Indexes on a previous date.
Handicap Certificates	Create a Handicap certificate for one or more members.
Handicap Freezes	List of Players with freeze applied to their Handicap.
Tee Handicaps Chart	Chart of Player's Tee Handicaps for a selected Course Scorecard.
Strokes Receiveds List (for Competition)	List of each competitors' Strokes Received for a selected competition.
Players without Handicaps	Players not yet allocated a Handicap.
Playing Record	Record of a player's playing record.
Playing Record (Visitors)	Record of a visiting player's playing record.
Playing Records (Selected Range of Handicaps)	Playing Records of Players with a Handicap within a selected range.
Handicap Changes	Players whose Handicaps have changed over a selected period of time.
Position-based Handicap Adjustments	Handicap Adjustments made based upon where players finished in a competition.
General Play Scores (Summary)	List how many General Play Scores each player has returned.
General Play Scores (Recorded)	Details of General Play Scores recorded.
Away Scores (Recorded)	Away Competition Scores recorded for one or more Home Players
Number of Scores Returned	Number of Scores each Player has returned.
Lowest Handicap Held	Lowest Handicap each player held during the current or previous season, or other period.

Lowest Handicap Held (selected Range of Handicaps)	Lowest Handicap (within selected range) each player held during the current or previous season, or other period.
Handicap Range	Minimum and Maximum Handicap each player held during selected period.
Summary of Scores	Summary of handicap Scores returned by each Player.
Most Improved Golfer	Rating of how each player has improved over the review period.
Handicap Record Archive	Archive if player's Handicap Record from Previous Handicap System.
Playing Notes	Playing Notes entered about each Player.

Accounting Reports

The Accounting reports are only available when the Subscriptions Option has been installed as a licenced option.

Report	**Description**
Income Received	Summary of Income received.
Member Purse Account Statement	Statement of Account for a Member and a Purse.
Member Purse Transaction History	List of Purse transactions recorded for one or more Members.
Purse Balances (Summary)	List Members' Purse Balances.
Purse Balances (Summary) - With Limit	List Members' Purse Balances on or below a limit.
Member Account Notes	List of account notes for Members
Members Without a Subscription Template	List of Members who have not been assigned a Subscription Template.
Subscription Pools	List of Member Subscription Pools. (A Pool has a single billing contact.)
Subscription Pools and Members	List of Member Subscription Pools, and their Members.
Payments (Summary)	Summary list of all Payments recorded for a time period.
Payments (Summary, by Method of Payment)	Income received, totalled by Method of Payment.
Payments (Full Details)	List of all Payments recorded for a time period.
Payments (by Member)	List of Payments recorded for a Member.
Payments (Default Method of Payments)	List of default Method of Payments for Members.
Subscriptions (Summary)	List members and their subscription template and list templates and members assigned to template.
Subscriptions (Summary of Overdue)	Summary of Overdue Subscriptions including outstanding amounts due.
Subscriptions (Valid)	List of Valid Subscriptions.
Subscriptions (Overdue)	Overdue Subscription details including payment items and schedule.
Subscriptions (expiry Date)	Expiry Date of member's subscription.
Subscriptions (Full Details)	List of Subscription template details and members assigned to template.

Subscriptions Assigned to Letters	List of Subscriptions assigned to each letter.
Subscription Purse Account Statement (Summary)	Subscription Purse statement Summary for one or more members for selected date range.
Competition Purse Income Received	Summary of Competition Purse credits,deductions, refunds and prizes.
Competition Purse Transactions	Competition Purse credits,deductions, refunds and prize transactions.
Competition Purse Account Statement (Summary)	Competition Purse Statement Summary for one or more members for selected date range.
Competition Purse Account Statements	Competition Purse Statements for one or more members.
Competition Purse Account Statements - With Limit	Competition Purse Statements for one or more member with limit.
Competition Purse Historic Balance for Members	Members' Competition Purse balance at end of a specific date, for current Members.
Competition Purse Historic Balance for Past Members	Members' Competition Purse balance at end of a specific date, for Past Members.
Competition Purse Prize (Summary)	List prizes awarded by date.
Competition Purse Prize (Detailed)	List prizes awarded by member including totals.
Invoices (Overdue)	List of Overdue Invoices.
Direct Debit Details	List and details of members paying by Direct Debit.
Audit Log	Report of all financial transactions.

Chapter

12

Working with Golf Clubs and Courses

12 Working with Golf Clubs and Courses

12.1 Introduction

Adding details of golf clubs and courses to HandicapMaster.

The primary purpose of adding and maintaining details of golf clubs and courses in HandicapMaster is to enter course scorecards (sometimes referred to as the 'Card of the Course'). These details are required for competition score entry, and other forms of score entry.

This 'Card of the Course' identifies the Par and Stroke Index for each hole and the course rating for the course. In HandicapMaster, this is called a *Course Scorecard*.

There is a hierarchy to the clubs and courses information in HandicapMaster. A **Course Scorecard** must be linked to a **Course**, which itself must be linked to a **Club/Organisation**.

There will be one Course Scorecard per gender per set of Tees on a course (E.g. Men's White Tees course, Ladies Red Tees course, etc.).

Contents

Clubs and Organisations

- Add a new Club or Organisation
- Change the name or region of a user-added Club/Organisation
- Delete a user-added Club/Organisation
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Courses

- Add additional Courses to a Club/Organisation
- Rename a Course
- Delete a Course
- Move a Course to a different Club/Organisation

Course Scorecards

- Enter and update Course Scorecard details
  - Change the Reference Score and/or set a Course Difficulty factor for a course
  - Copy the details of another Course Scorecard
  - Delete a Course Scorecard
  - Change the Tee Colours provided

12.2 **Add a new Club or Organisation**

To add a new Golf Club or Organisation

To add the name of a club or organisation that is not already displayed in HandicapMaster, do the following:

1. Do one of the following:

    - On the **Players** menu, click **Golf Courses**, then **Add a Club/Organisation**.

    - In the Golf Courses Task list, select **Add a Club/Organisation**.

    - In the Course Scorecards list, right-click over any course scorecard and select **New Club/Organisation** in the pop-up menu. These will be entries shown with a *Building* icon.

2. Enter the name of the Golf Course and choose the most applicable Region.

3. Click the **OK** button to save the details.

See Also

Clubs and Organisations

- Change the name or region of a user-added Club/Organisation

- Delete a user-added Club/Organisation

- Enter Club contact details and addresses

- Change the name of 'Other' region

Courses

- Add additional Courses to a Club/Organisation

- Rename a Course

- Delete a Course

- Move a Course to a different Club/Organisation

Course Scorecards

- Enter and update Course Scorecard details

    - Change the Reference Score and/or set a Course Difficulty factor for a course

    - Copy the details of another Course Scorecard

    - Delete a Course Scorecard

    - Change the Tee Colours provided

12.3 Change the name of a user-added Club/Organisation

You may change the name of a user-added Club/Organisation (that is, one that has been added by someone operating your copy of HandicapMaster), or the region it is listed in.

It is not possible to change these details for clubs/organisations that have been added through software updates.

The ones that have been added by your users are shown with a green 'plus' symbol shown over the *Building* icon.

Change the name or region of a user-added Club/Organisation

1. On the Left Hand Task Pane, select **Golf Courses** place.

2. Do one of the following:

- In the Golf Courses Tasks, click **Edit Club/Organisation**. In the applicable region select the golf course from the list and click **OK**.

- In the Course Scorecards list, right-click over a course scorecard and select **Edit Club/Organisation** in the pop-up menu.These will be entries shown with a *Building* icon.

3. Update the details and click the **OK** button to save the changes.

See Also

Clubs and Organisations

- Add a new Club or Organisation

- Delete a user-added Club/Organisation

- Enter Club contact details and addresses

- Change the name of 'Other' region

Courses

- Add additional Courses to a Club/Organisation

- Rename a Course

- Delete a Course

- Move a Course to a different Club/Organisation

Course Scorecards

- Enter and update Course Scorecard details

  - Change the Reference Score and/or set a Course Difficulty factor for a course

  - Copy the details of another Course Scorecard

  - Delete a Course Scorecard

  - Change the Tee Colours provided

12.4   Delete a user-added Club/Organisation

You may delete user-added Club/Organisations (that is, ones that have been added by someone operating your copy of HandicapMaster).

It is not possible to delete clubs/organisations that have been added through software updates.

The ones that have been added by your users are shown with a green 'plus' symbol shown over the Building icon.

To delete a user-added Club/Organisation

To delete a course that has been previously added

1. On the left hand task pane, select **Golf Courses** place.

2. In the left hand pane, click **Edit Club/Organisation**.

3. Highlight the applicable Club/Organisation in the list, then click the **Delete** button.

Notes:

You may not delete System defined courses, those with no green 'plus' symbol over the *Building* icon.

If a user-added club/organisation is referenced by HandicapMaster e.g. there are competition records for this course, then it may not be deleted.

See Also

Clubs and Organisations

- Add a new Club or Organisation
- Change the name or region of a user-added Club/Organisation
- Enter Club contact details and addresses
- Change the name of 'Other' region

Courses

- Add additional Courses to a Club/Organisation
- Rename a Course
- Delete a Course
- Move a Course to a different Club/Organisation

Course Scorecards

- Enter and update Course Scorecard details
    - Change the Reference Score and/or set a Course Difficulty factor for a course
    - Copy the details of another Course Scorecard
    - Delete a Course Scorecard
    - Change the Tee Colours provided

12.5 **Enter Club Contact Details and Addresses**

You may record details of contacts (such as Handicap Secretary or Convener) for other golf clubs into HandicapMaster

The Address will then be used in the Report Away Players' Scores to their Home Clubs report for sending letters to other Golf Clubs.

Any e-mail address recorded will be used when e-mailing away scores to the other clubs.

To enter Contact Details for a Golf Course

1.   Do one of the following:

- On the **Players** menu, click **Golf Courses**, then **Golf Club Contact Details** and choose the applicable Club or Organisation.

- On the left hand task pane, select **Golf Courses** place, then click **Golf Club Contact Details** in the Golf Courses Tasks.

2.   Enter the applicable details for this club.

3.   Click the **OK** button to save the details.

To clear e-mail rejection for Contact Details for a Golf Course

1. You can clear an e-mail rejection

2. Click the *Clear Rejection* button

3. If the recipient has a current rejection, the reason for the rejection and when it was created will be displayed.

4. Review the rejection reason and if reason is not a permanent error e.g. an invalid e-mail address then confirm you wish to remove the rejection. But **ONLY** if the recipient has agreed.

Notes:

- If an e-mail address is supplied then this golf club may be added to a Golf Courses Distribution List.

See Also

Clubs and Organisations

- Add a new Club or Organisation

- Change the name or region of a user-added Club/Organisation

- Delete a user-added Club/Organisation

- Change the name of 'Other' region

Courses

- Add additional Courses to a Club/Organisation

- Rename a Course

- Delete a Course

- Move a Course to a different Club/Organisation

Course Scorecards

- Enter and update Course Scorecard details

    - Change the Reference Score and/or set a Course Difficulty factor for a course

    - Copy the details of another Course Scorecard

    - Delete a Course Scorecard

    - Change the Tee Colours provided

12.6 Change name of 'Other' Region

When selecting a Club/Organisation from the system, one of the nominated regions shown in the tabs above the list of courses is called 'Other'. You may elect to rename this to your preference.

To change the name of the 'Other' region of courses

1. On the Left Hand Task Pane, select **Golf Courses** place

2. Select ANY course scorecard in the list and right-click over this entry in the list. These will be entries shown with a *Building* icon.

3. In the pop-up menu, select **Rename Region 'Other'**.

See Also

Clubs and Organisations

- Add a new Club or Organisation

- Change the name or region of a user-added Club/Organisation

- Delete a user-added Club/Organisation

- Enter Club contact details and addresses

Courses

- Add additional Courses to a Club/Organisation

- Rename a Course

- Delete a Course

- Move a Course to a different Club/Organisation

Course Scorecards

- Enter and update Course Scorecard details

    - Change the Reference Score and/or set a Course Difficulty factor for a course

    - Copy the details of another Course Scorecard

    - Delete a Course Scorecard

    - Change the Tee Colours provided

12.7 Add additional Courses and Score Cards to a Club/Organisation

If your club has two or more courses,you may add additional courses to a club/organisation in HandicapMaster.

You may also add additional score cards.

Score cards are shown with Yellow (18-holes) or Red (9-holes) *flags* icons.

To add additional courses

You may add a new course to a chosen club/organisation by:

1. On the left hand task pane, select **Golf Courses** place.

2. Right-click over another course for this club/organisation and select **New Course** in the pop-up menu.

Alternatively, you may add or edit courses for a club when adding or editing a course scorecard for that club.

1.   Do one of the following:

- On the **Players** menu, click **Golf Courses**, then **Add a Course Scorecard** and choose the applicable Club/Organisation.

- On the left hand task pane, select **Golf Courses** place, then either

  - click **Add a Course Scorecard** in the Golf Courses Tasks.

  - click **Add** button shown above the list of Course Scorecards.

2. Click **NEW** to add a new course.

To add additional score cards

Once you have added a club/organisation you may add a new score card,

See Also

Clubs and Organisations

- Add a new Club or Organisation

- Change the name or region of a user-added Club/Organisation

- Delete a user-added Club/Organisation

- Enter Club contact details and addresses

- Change the name of 'Other' region

Courses

- Rename a Course

- Delete a Course

- Move a Course to a different Club/Organisation

Course Scorecards

- Enter and update Course Scorecard details

    - Change the Reference Score and/or set a Course Difficulty factor for a course

    - Copy the details of another Course Scorecard

    - Delete a Course Scorecard

    - Change the Tee Colours provided

12.8   Rename a Course

To rename a club course

You may rename a course for a chosen club/organisation by:

1. On the left hand task pane, select **Golf Courses** place.

2. Right-click over another course for this club/organisation and select **Edit Course Name** in the pop-up menu.

Alternatively, you may edit courses for a club when adding or editing a course scorecard for that club.

1.   Do one of the following:

- On the **Players** menu, click **Golf Courses**, then **Add a Course Scorecard** and choose the applicable Club/Organisation.

- On the left hand task pane, select **Golf Courses** place, then either

    - click **Add a Course Scorecard** in the Golf Courses Tasks.

    - click **Add a Course Scorecard** shown below the list of Course Scorecards.

2. Select the Club or Organisation this scorecard relates to and click **OK**.

3. On the Course Scorecard toolbar, select the down arrow along the course name. In the drop-down list, click **Edit Courses List...**

4. Select the applicable course in the list and click **Edit** to edit the name of the course.

5. Click **Close** to return to the Course Scorecard.

See Also

Clubs and Organisations

- Add a new Club or Organisation

- Change the name or region of a user-added Club/Organisation

- Delete a user-added Club/Organisation

- Enter Club contact details and addresses

- Change the name of 'Other' region

Courses

- Add additional Courses to a Club/Organisation

- Delete a Course

- Move a Course to a different Club/Organisation

Course Scorecards

- Enter and update Course Scorecard details

    - Change the Reference Score and/or set a Course Difficulty factor for a course

    - Copy the details of another Course Scorecard

- Delete a Course Scorecard

- Change the Tee Colours provided

12.9   Delete a Course

<div style="border:1px solid #000; background:#ffffcc; padding:4px;">**To delete a club course**</div>

> May not be available in all regions due to regulatory restrictions.

You may delete a course for a chosen club/organisation by:

1. On the left hand task pane, select **Golf Courses** place.

2. Right-click over another course for this club/organisation and select **Delete** in the pop-up menu.

Alternatively, you may delete courses for a club when adding or editing a course scorecard for that club.

1.   Do one of the following:

- On the **Players** menu, click **Golf Courses**, then **Add a Course Scorecard** and choose the applicable Club/Organisation.

- On the left hand task pane, select **Golf Courses** place, then either

  - click **Add a Course Scorecard** in the Golf Courses Tasks.

  - click **Add a Course Scorecard** shown below the list of Course Scorecards.

2. Select the Club or Organisation this scorecard relates to and click **OK**.

3. On the Course Scorecard toolbar, select the down arrow along the course name. In the drop-down list, click **Edit Courses List...**

4. Select the applicable course in the list and click **Delete** to delete this course.

5. Click **Close** to return to the Course Scorecard.

<div style="border:1px solid #000; background:#ffffcc; padding:4px;">**Note:**</div>

If a course is referenced by HandicapMaster e.g. there are competition records for this course, then it may not be deleted.

<div style="border:1px solid #000; background:#ffffcc; padding:4px;">**See Also**</div>

Clubs and Organisations

- Add a new Club or Organisation

- Change the name or region of a user-added Club/Organisation

- Delete a user-added Club/Organisation

- Enter Club contact details and addresses

- Change the name of 'Other' region

Courses

- Add additional Courses to a Club/Organisation

- Rename a Course

- Move a Course to a different Club/Organisation

Course Scorecards

- [Enter and update Course Scorecard details](#)
    - [Change the Reference Score and/or set a Course Difficulty factor for a course](#)
    - [Copy the details of another Course Scorecard](#)
    - [Delete a Course Scorecard](#)
    - [Change the Tee Colours provided](#)

12.10 Move a Course to a different Club/Organisation

You may move a course so that it is listed under a different club/organisation by:

1. On the left hand task pane, select **Golf Courses** place.

2. Right-click over the applicable course course scorecard and select **Move to different Club/Organisation** in the pop-up menu.

3. Select the club/organisation that you would like this course listed under in the list and click **OK**.

Clubs and Organisations

- Add a new Club or Organisation

- Change the name or region of a user-added Club/Organisation

- Delete a user-added Club/Organisation

- Enter Club contact details and addresses

- Change the name of 'Other' region

Courses

- Add additional Courses to a Club/Organisation

- Rename a Course

- Delete a Course

Course Scorecards

- Enter and update Course Scorecard details

  - Change the Reference Score and/or set a Course Difficulty factor for a course

  - Copy the details of another Course Scorecard

  - Delete a Course Scorecard

  - Change the Tee Colours provided

12.11 Enter and update Course Scorecard details

Once entered, the details for a specific course are remembered and need only be changed if an alteration to the course is made.

Score cards are shown with Yellow (18-holes) or Red (9-holes) *flags* icons.

1. Do one of the following:

    - On the **Players** menu, click **Golf Courses**, then **Course Scorecards**.

    - On the left hand task pane, select **Golf Courses** place.

2. Either:

    - Highlight the course scorecard in the list, then click **Edit Course Scorecard** in the Golf Courses Tasks, or

    - Double-click the applicable Course Scorecard in the list.

3. On the Course Scorecard toolbar, select ...

    i. The course at this club that this scorecard relates to,

    ii. The Tee colour, and

    iii. Whether the scorecard is for Men or Ladies.

2. Enter the Par and Stroke Index details for each of the eighteen holes. When entering a Stroke Index of 1, type 1 then either press TAB key or DOWN ARROW key to move to the next hole.

3. Enter the **Reference Score** sand **Course Difficultys** of the course.

    Note: Only the 18 Hole ratings are obligatory, although the 9 Hole ratings will be required if 9-hole qualifying competitions are to be processed.

4. Click the **Enter** button or press ENTER key to save the course details.

    If there are opened competitions where players have entered scores based on this scorecard, you are prompted to recalculate the competition scores for each competition in turn,

To copy the Pars, Stroke Indexes and Course ratings from another Course Scorecard already entered

If you wish to use the same details previously entered for a different set of tees, gender and/or course, click **Copy** on the Course Scorecard Toolbar and select the course scorecard to be copied. Not available when the course scorecard has been downloaded from a National handicapping service.

To use a Tee colour not currently listed

If you wish to use a Tee Colour that not listed, click the **Tee Colour** drop-down list and then select **Edit Tees List...**

You may now add or edit the Tee Colours offered in the list.

Notes

- HandicapMaster will check that each hole has a unique Stroke Index value (i.e. all numbers between

1 and 18 inclusive have been used), This is to prevent mistakes when entering details.

- The length of each hole may be recorded along with the course details. To record length of holes, turn this feature on using the Golf Courses option in the Global Options window. If length of holes is recorded, these will be included in the 'Scorecards from a competition' report.

See Also

Clubs and Organisations

- Add a new Club or Organisation

- Change the name or region of a user-added Club/Organisation

- Delete a user-added Club/Organisation

- Enter Club contact details and addresses

- Change the name of 'Other' region

Courses

- Add additional Courses to a Club/Organisation

- Rename a Course

- Delete a Course

- Move a Course to a different Club/Organisation

Course Scorecards

- Change the Reference Score and/or set a Course Difficulty factor for a course

  - Copy the details of another Course Scorecard

  - Delete a Course Scorecard

  - Change the Tee Colours provided

12.12 Apply a Course Difficulty factor to a course scorecard

To change the Reference Score and/or set a Course Difficulty factor for this course

1. Do one of the following:

   - On the **Players** menu, click **Golf Courses**, then **Add a Course Scorecard** and choose the applicable Golf Club.

   - On the left hand task pane, select **Golf Courses** place, then either

     - Click **Edit Course Scorecard** in the Golf Courses Tasks, or

     - Double-click the applicable Course Scorecard in the list.

2. Click **Change** link.

3. In the **Reference Score for Handicapping** boxes, enter the **Front 9-holes** and **Back 9-Holes** baseline scores (as applicable).

4. If you wish to apply a Course Difficulty factor to each player's Tee Handicap when they play to this course scorecard, tick **Adjust Tee Handicap to compensate for Course Difficulty** box. Then

   a. In the **Course Difficulty** box, select the appropriate difficulty setting for this course. Select **Other...** if you wish to set a specific percentage to be applied to each player's Tee Handicap and enter the applicable percentage value. Values from -50 to +50 may be used.

See Also

Clubs and Organisations

- [Add a new Club or Organisation](#)

- [Change the name or region of a user-added Club/Organisation](#)

- [Delete a user-added Club/Organisation](#)

- [Enter Club contact details and addresses](#)

- [Change the name of 'Other' region](#)

Courses

- [Add additional Courses to a Club/Organisation](#)

- [Rename a Course](#)

- [Delete a Course](#)

- [Move a Course to a different Club/Organisation](#)

Course Scorecards

- [Enter and update Course Scorecard details](#)

  - [Copy the details of another Course Scorecard](#)

  - [Delete a Course Scorecard](#)

  - [Change the Tee Colours provided](#)

12.13 Copy the details of another Course Scorecard

When entering more than one 'Card of the Course' for a course, you may wish to copy the Par, Stroke Indexes and Handicapping parameters from those already entered for another Course Scorecard.

To copy the details of another 'Card of the Course'

You may copy another Course Scorecard when editing or updating a Course Scorecard.

1. On the Course Scorecard toolbar, select **Copy**.

2. Choose the Course Scorecard to copy and click **OK**.

See Also

Clubs and Organisations

- Add a new Club or Organisation

- Change the name or region of a user-added Club/Organisation

- Delete a user-added Club/Organisation

- Enter Club contact details and addresses

- Change the name of 'Other' region

Courses

- Add additional Courses to a Club/Organisation

- Rename a Course

- Delete a Course

- Move a Course to a different Club/Organisation

Course Scorecards

- Enter and update Course Scorecard details

  - Change the Reference Score and/or set a Course Difficulty factor for a course

  - Delete a Course Scorecard

  - Change the Tee Colours provided

12.14 Delete a Course Scorecard

To delete a Course Scorecard ('Card of the Course')

1. On the left-hand task pane, select **Golf Courses** place.

2. On the right-hand pane, select the Course Scorecard you wish to delete.

3. With the applicable Course Scorecard highlighted, press the DELETE key on the keyboard.

Note:

It will not be possible to delete a Course Scorecard if it has been used for a competition or handicap score in a player's record.

See Also

Clubs and Organisations

- Add a new Club or Organisation

- Change the name or region of a user-added Club/Organisation

- Delete a user-added Club/Organisation

- Enter Club contact details and addresses

- Change the name of 'Other' region

Courses

- Add additional Courses to a Club/Organisation

- Rename a Course

- Delete a Course

- Move a Course to a different Club/Organisation

Course Scorecards

- Enter and update Course Scorecard details

  - Change the Reference Score and/or set a Course Difficulty factor for a course

  - Copy the details of another Course Scorecard

  - Change the Tee Colours provided

12.15 Change the system Tee Colours

You may edit or create custom Tee colours to use in HandicapMaster.

Six Tee Colours are included as Standard.

Some additional Tee Colours are available which may be used, or you may create your own.

<div style="background-color: #fdfdc0;">

Choose which Tee Colours to are made available to use

</div>

Tick the box alongside any of the additional Tee Colours to make these available when creating Course Scorecards.

<div style="background-color: #fdfdc0;">

Create new Tee Colours

</div>

If you wish to use Tee Colours that are not listed, you may create your own. To access the Tee Colours list, when displaying a Course Scorecard, click the select tee colour, then click **Edit Tees List** in the drop-down menu.

Do the following:

1. Click **New ...** button

2. In the **Description** box, enter the title of the Tees.

3. Click **Colour ...** button and choose a background colour for this Tee Colour.

4. Select whether the text should be displayed as **Black Text** or **White Text**.

5. Click **OK** to save your changes to the list of Tee Colours.

<div style="background-color: #fdfdc0;">

Notes

</div>

- You may edit the background colour and text colour of any additional Tee colours that you have created.

<div style="background-color: #fdfdc0;">

See Also

</div>

Clubs and Organisations

- Add a new Club or Organisation

- Change the name or region of a user-added Club/Organisation

- Delete a user-added Club/Organisation

- Enter Club contact details and addresses

- Change the name of 'Other' region

Courses

- Add additional Courses to a Club/Organisation

- Rename a Course

- Delete a Course

- Move a Course to a different Club/Organisation

Course Scorecards

- Enter and update Course Scorecard details
  - Change the Reference Score and/or set a Course Difficulty factor for a course
  - Copy the details of another Course Scorecard
  - Delete a Course Scorecard

Chapter 13

Working with Stroke Play Competitions

13 Working with Stroke Play Competitions

13.1 Introduction

How to enter a Stroke-play competition into HandicapMaster

Competitions form the backbone of both the handicapping system. Handicap systems take account of every score returned 'under Stroke-play conditions'. HandicapMaster, therefore, provides the tools to process Competition scores.

This chapter discusses the necessary actions required to process stroke play competitions.

Note

Match Play competitions are discussed in a subsequent chapter.

Contents

- The type of Stroke-play Competitions supported by HandicapMaster
- Overview of Competitions
- Setting up competitions
- Inputting golf course details
- Opening a new competition
- Entering competition scores
- Processing competition scores
- 2's returned by competitors
- Competitions played over more than one round
- Order of Merit Competitions
- Eclectic Competitions
- Suspend players from Competitions
- Manage Competition Entry Fees

13.2   Types of Stroke-play competitions supported

The following is a list of the formats of competitions which can be processed by HandicapMaster.

- Singles Stroke Play competitions (Regular Stroke Play, Maximum Score, Stableford and Par),

- Doubles Stroke Play competitions (Foursomes, Four-Ball, Greensomes or 2-player Am-Am style),

- 'Texas' and 'Florida' Scrambles (2, 3 or 4 man teams),

- Team competitions where the team's score is the best score(s) returned by the team's players on each hole ('Am-Am' style competitions).

- Handicap Counting and Non-Handicap Counting.

- Varying methods of presenting results (winners, etc.) such as Divisions, etc.

- Multiple round competitions (i.e. 36, 54 or 72 hole competitions)

- 'Best of' (or 'league') competitions played over a sequence of rounds

- Competitions played over 9, 12 and 18 hole courses

- "Short course" Competitions played over less than 18 holes i.e. from 1 hole played up to 17 holes played.

13.3 Run a Stroke-play Competition - Overview

HandicapMaster requires you to process competition scores in six stages:

To run a Stroke-play Competition

1.   If you do not already have a suitable Competition Template added, <u>set up a Template</u>. A Template describes the format of the competition.

2.   Enter the Course Scorecard details. The Par and Stroke Index values for the course used in the competition must be entered if they are not already in the database.

3.   Open a New Competition. This makes the Competition available for Score Entry.

4.   Enter Scores.

5.   Apply Scores. This closes the competition.

6.   View Results.

13.4   Competition Templates

13.4.1   Introduction to Competition Templates

'Setting Up' of a competition requires you to identify certain characteristics of the competition prior to entering scores. This is in much the same way that the R&A and USGA Rules of Golf Committee Procedures requires the Committee to define the conditions of a competition prior to play.

Once a competition has been 'set up', the format is held on the database for future reference. This is known as a **Template**. If you choose the template at a later date, the same settings will be used again; providing a level of consistency when running re-occurring competitions such as regular stroke-play.

See Also

- Add a new Competition Template
- Modify a Competition Template
- Copy a Competition Template
- Hide a Competition Template
- Delete a Competition Template
- The Competition Template Wizard
- Running Multiple-round and Alternative Day Competitions
- Matching Scorecards ("Countback") to resolve a Tie

13.4.2   Add a new Competition Template

To create a new Competition Template

1.   Do one of the following:

   - On the **Competitions** drop-down menu, click **Set up a Template**.

   - On the left hand task pane, select **Competitions** place. Click **Set up a Template** in the competition tasks list..

2.   Select the template Information using the Competition Template Wizard provided.

See Also

- Modify a Competition Template
- Copy a Competition Template
- Hide a Competition Template
- Delete a Competition Template

13.4.3 Modify a Competition Template

To modify the details of an existing Competition Template

1. On the left hand task pane, select **Competitions** place.

2. On the right hand pane, double-click **Templates**.

3. Do one of the following:

   - Select a Template and press ENTER Key, or

   - Double-click the Template entry in the list.

4. Modify the template Information using the Competition Template Wizard provided.

Note

When a competition is opened through the Open a New Competition wizard, the template properties are applied to that competition. Changing the template does not automatically update the settings of existing competitions.

If there are any opened competitions based on the template being changed, HandicapMaster asks if these should be updated. There is then an option to update the configuration for each competition in turn, based on the amended template.

Alternatively, the template properties applied to an opened (or undone closed competition) can be modified through the **Config** button on the Enter Scores Toolbar. This method updates the template and that competition only.

See Also

- Add a new Competition Template

- Copy a Competition Template

- Hide a Competition Template

- Delete a Competition Template

13.4.4 Copy a Competition Template

To copy a Competition Template

1. On the left hand task pane, select **Competitions** place.

2. On the right hand pane, double-click **Templates**.

3. Do one of the following:

   - Select a Template and click **Copy Template** in the Competition Tasks list, or

   - Right-click over a selected Template, then select **Create Copy**.

See Also

- Add a new Competition Template

- Modify a Competition Template

- Hide a Competition Template

- Delete a Competition Template

13.4.5 Hide a Competition Template

To help maintain the list of Templates, you may choose to hide one or more from view from time to time. These may then be restored to view at a later date.

To hide a Competition Template

1. On the left hand task pane, select **Competitions** place.

2. On the right hand pane, double-click **Templates**.

3. Do one of the following:

   - Select a Template and click **Hide Template** in the Competition Tasks list, or

   - Right-click over a selected Template, then select **Hide Template**.

To restore to view any hidden Templates

1. On the left hand task pane, select **Competitions** place.

2. On the right hand pane, double-click **Templates**.

3. Do one of the following:

   - Click **Restore Hidden Templates** in the Competition Tasks list, or

   - Right-click over any existing Template, then select **Restore Hidden Templates**

4. Select one or more templates to be restored.

See Also

- Add a new Competition Template

- Modify a Competition Template

- Copy a Competition Template

- Delete a Competition Template

13.4.6 Delete a Competition Template

To delete an existing Competition Template

1. On the left hand task pane, select **Competitions** place.

2. On the right hand pane, double-click **Templates**.

3. Do one of the following:

   - Select a Template and press DELETE Key, or

   - Right-click over a selected Template, then select **Delete**.

To delete more than one Competition Template at the same time

1. In the Templates list, right-click and select **Delete Multiple Templates**.

2. Tick the box along side those Templates to be deleted.

3. Click **OK** and confirm the deletion.

To delete ALL Competition Templates records

1. In the Templates list, right-click and select **Delete Multiple Members**.

2. Click **Select All**.

3. Click **OK** and confirm the deletion.

See Also

- Add a new Competition Template

- Modify a Competition Template

- Copy a Competition Template

- Hide a Competition Template

13.4.7 The Competition Template Wizard

The Competition Template Wizard steps through the stages of configuring a competition.

About this Competition

Choose the format and nature of the competition.

1.   In the **Name** box, select an appropriate name for this Template. For example, "Monthly Medal" would be a suitable name. "Medal 15/4/2004" would not be a good name, as it would prevent the template being used for future Medal Competitions.

2.   From the **Form of play** list, select the format of play from the available options. These are Regular Stroke Play, Maximum Score, Stableford and Par/Bogey (Also called vPar).
        If you select *Maximum Score*, choose the **Maximum** score that each player may record on any single hole.

3.   In the **How Players Compete** box, select the format of the competition from the available options:

- Singles

- Pairs

- Teams - Scramble

- Teams - Best scores count each hole

Competition Scoring

Where option *Pairs*, *Teams - Scramble* or *Teams - Best scores count each hole* is selected as how players compete then choose the type of scoring to be employed for the competition.

If *Pairs* is selected, choose from

- Foursomes

- Greensomes

- Four-Ball *(sometimes called 'Four Ball Better Ball')*

- Aggregate Scores

If *Teams - Scramble* is selected, choose from

- Texas Scramble (or 'Ambrose')

- Florida Scramble (or 'Step-aside Scramble')

If *Teams - Best scores count each hole* is selected, choose from

- Best 1 score each hole to count

- Best 2 scores each hole to count

- Best 3 scores each hole to count

- Best 4 scores each hole to count

- Best 1 score for 6 holes, then 2 for 6, then 3 for 6

- Waltz (Best 1, 2, 3, 1, 2, 3.. scores per hole

- Best 2 scores for 6 holes, then 3 for 6, then 4 for 6

- Best 4 scores for 6 holes, then 3 for 6, then 2 for 6

- A selection of best scores per hole

Team competition with best scores to count each hole

If the format of the competition is *Teams - Best scores count each hole*, and also *A selection of best scores each hole*, choose the number of 'best' scores that will count for each team on each hole. For example, if the best 3 scores from 4 count on hole 1, select 3 for this hole.

You may be creative with the arrangement of best scores counting, creating 'Waltzes', or more scores counting on Par 3's than other holes, etc!

Number of players in a Team

For pairs and team competitions, in the **Each Team may consist of** list, select the number of players each team is allowed to have to enable a score to be entered.

Note: For some formats, such as *Foursomes*, all teams must have the same number of players. In these situations, this list is not displayed.

Holes being Played

In the **Play will be over** box, select which holes on the Course Scorecard will be used.

If the holes selected for the round is 'A Selection of Holes', choose the holes to be played by ticking the application boxes. A minimum of 1 hole is required.

Who may enter this competition

You may restrict who is eligible to play in the competition. This will influence which players are offered as entrants to competitions.

- Tick the **Men** box if gentlemen are eligible to play.

- Tick the **Ladies** box if ladies are eligible to play.

If the competition is an "open" competition (I.e. Non-members may enter), tick the **Visitors** box.

In the 'Other restrictions on entry' section,

- Tick **Only players in selected age groups** box if some players in selected age groups are not eligible to enter. Only players who are in one of the selected Age Groups (as defined in their Membership Record) will be allowed to be entered into the Competition. Two of the Age Groups provided may be renamed using Options.

- Tick **Only members in selected membership categories** box if some players in selected membership categories are not eligible to enter. Select which of the membership categories are eligible to enter.

- Tick **Only players with a Handicap within a selected range** box if there is a restriction on who may enter based upon the player's handicap (e.g. "Only players with a handicap of 18 or over may enter"). Enter the range of handicaps allowed to enter in the **Handicaps from / to** boxes.

  Note: When checking if a player is eligible to enter the competition, the player's current handicap held on the system will be checked (which could differ from the handicap held by the player at the date of the competition when entering scores into a past competition).

Note:
At least one of Men/Ladies boxes must be selected.

How players will score

1. In the **How Players Score** list, select either **Scratch Competition** (if no handicap allowance is to be used), or **Handicap Competition**.

2. If you have selected *Handicap Competition:*

   a. In the **Strokes Received** box, select a Handicap Allowance.

   b. For handicapping, the player's Tee Handicap is used (where applicable) for handicapping purposes but the Strokes Received is applied for competition ranking purposes only when the competition is closed.

   c. Where the competition is open to players playing from different sets of Tees, it may be applicable to make an adjustment to handicaps to take into account differences in the course details for the different Tees. In the **When competitors play from different Tees** box select whether to increase or to decrease Strokes Received in this situation.

   This option may not be available, depending upon the nature of the competition format and the handicapping rules in play.

   d. Tick the **Limit Strokes Received** box if the competition is to be played off a restricted number of handicap strokes.

   i. Choose whether this limit is to be applied **AFTER calculating Strokes Received** or **(To Tee Handicaps) BEFORE calculating Strokes Received**.

   Example:
   if a competition is 3/4 handicap, with 18 strokes maximum, then this can mean for a player with a 28 handicap either

   - **BEFORE** setting:

     28 is higher than 18 so limit is 18. Then (3/4 * 18) = 13.5, so player receives <u>14 strokes</u>.

(Limit of 18 is applied "before" calculating 3/4 Strokes Received)

- **AFTER** setting:

  (3/4 * 28) = 21, but maximum 18 so player receives <u>18 strokes</u>
  (Limit of 18 is applied "after" calculating 3/4 Strokes Received)

Example:

if a competition is 3/4 handicap, with 18 strokes maximum, then this can mean for a 28 handicapper that he is restricted to 18 strokes (instead of receiving 21 strokes):

- (3/4 * 28) = 21, but maximum 18 so player receives 18 strokes
  (Limit of 18 is applied "after" calculating 3/4 Strokes Received)

When the handicap allowance is "full allowance", this setting makes no difference.

    ii.   Enter the handicap limits in the **Men** and **Ladies** boxes (or **Team** box).

e.   If the competition is being played over a course of less than 18 holes, tick the **Use Stroke Indexes of 1 to *n* for holes in play** box to adjust the Stroke Index table for this competition so that the lowest stroke index values are allocated to the holes in play. The ordering of Indexes, for these holes in play, will be retained from the original Stroke Index table saved in the Course Scorecard.

Handicap Adjustments

Handicap counting competitions are competitions where handicaps of the competitors will be revised automatically after the close of the competition. The handicapping authorities restrict the formats of competitions that are allowed to count. These are typically limited to competitions that meet all of the following criteria:

- Regular Stroke play, Maximum Score, Stableford or Par competitions played by individuals ('singles')

- 18 hole competitions

- 9 Hole competitions (in some cases).

HandicapMaster will identify whether a competition format selected may be chosen as a Handicap counting competition.

1.   Tick the **Scores count for Handicap purposes** box if scores returned in the competition should count for handicapping.

Set Competition Entry Fees

Tick the **Set Competition Entry Fee(s)** box to configure entry fee(s) for the competition.

- Enter an Entry Fee in the **Fee** box. If your accounting system uses Accounting or Product codes, enter the code in the **Accounting Code** box.

- Tick the **2**, **3**, **4** or **5** box to add additional fees for this competition. Enter a suitable description for this item along with a Fee and Accounting Code (if applicable). Select Mandatory or Optional. Where a fee is optional, HandicapMaster will mark the fee as payable only where a Player (or team) chooses to select the fee when they sign in to a competition.

Presentation of Results

This page describes how the competition results will be generated and presented. In particular, this describes how the winners will be identified (highlighted).

Overall Winners are identified as the best scores from all of the cards processed. The players at the top of the results will be identified with 'Overall Winner', 'Overall Runner-Up', 'Overall Third', etc.

Divisional winners are identified from three subsets of the competitors. Ranges of handicaps determine these subsets. The division into which a specific competitor falls depends upon the handicap of that competitor. The divisions are called DIVISION 1, DIVISION 2, DIVISION 3 and DIVISION 4, with Division 1 accepting the lowest handicapped competitors.

Divisional winners are calculated after the Overall Winners have been determined (Overall Winners are excluded from the divisions).

Divisions are not available for team competitions.

1. In the **Number of Overall Winners** box, enter the number of winners to be highlighted. This may be from 0 to 999 inclusive.

2. To split the field of competitors into Divisions, tick the **Show results in Divisions** box.

3. Identify how many divisions (2 to 4) you would like the field split into. Enter this number in the **Number of Divisions** box.

4. To allow the maximum **Handicap** for each division to be automatically adjusted to give similar numbers of players in each division, tick **Auto-balance**. New division boundaries will be set whenever the results are calculated, and may be different for each type of result.

5. For each division:

   - Set the name to use as the heading for the Division results if the default is not suitable. Also, set the name to use as the heading for the Overall Winners results if the default is not suitable.

   - If auto-balance is not selected, set the maximum Handicap for the division. Competitors are placed in the first division where their Handicaps are below the maximum Handicap.

   - Set the number of Divisional Winners to be highlighted in the division.

   To manually set the maximum handicap for each division, enter the values for all but the last of the divisions in the applicable **Upper Handicap** boxes.

6. In the **Number of Winners in each Division** box, enter the number of Divisional winners to be highlighted in each division. This may be from 0 to 999 inclusive.

7. Tick the **Match Scorecards ("Countback")** box to cause HandicapMaster to automatically resolve ties using a card countback.

   With this option selected, scorecards are compared in an attempt to split the tie. See Matching Scorecards ("Countback") to resolve a Tie for further details.

   If the option is not selected, or if count-back has not produced a result, HandicapMaster prompts for the tie to be decided manually (by whatever means the competition organisers have previously declared). In this case, ties are only decided for the overall prize-winning positions.

8. Tick the **Show top ... positions only** box to limit the displaying of results to the top placed players and teams. Enter a suitable value for the number of positions to display results to.

   Notes:

   - When presentation of results are limited to the top X positions the limit value applies to overall winners and to divisions if presentation by divisions is also selected.

- The limit will be automatically applied on the MasterScoreboard.co.uk service if this is being used by your organisation.

9. Tick the **List Twos** box to cause HandicapMaster to display a list of the players who scored Twos (or better!) on the results report.
   Note: This is not available for Four Ball Better Ball Competitions.

See Also

- Add a new Competition Template

- Modify a Competition Template

- Copy a Competition Template

- Delete a Competition Template

- Running Multiple-round and Alternative Day Competitions

- Matching Scorecards ("Countback") to resolve a Tie

13.4.8 Mixed Tee Competitions

How HandicapMaster processes handicaps for Mixed Tee Competitions

In competitions where players play from different sets of Tees, there can be a discrepancy between the Par and/or Reference Score between the courses being played by players.

HandicapMaster will adjust the Strokes Received of some players, as required, to create equitable handicapping, if an applicable selection is made in the **When Competitors play from different Tees** option in the competition template.

These adjustments are applied to the competition results only, not to any handicapping adjustments.

These adjustments will be added to (or subtracted from) each player's Strokes Received where applicable. Typically, some players in the field will receive no adjustment, though.

HandicapMaster will adjust Handicaps using the following ...

1. If **An adjustment of "Reference Score minus Par" added** option has been selected in the Handicapping Rules:

   Stroke Play (Medal / Maximum Score) Competitions

   In stroke play (medal) handicap competitions, a comparison is made between the Pars recorded in the Course Scorecards in play for the competition. Those players who are playing from Tees where the Pars of their Course Scorecard is higher than the minimum Par in play receive the difference between their Par and the minimum Par in play added to their Strokes Received.

   Bogey, Par and Stableford Competitions

   No adjustments are applicable.

2. If **An adjustment of "Reference Score minus Par" added** option has not been selected in the Handicapping Rules:

   Stroke Play (Medal / Maximum Score) Competitions

   In stroke play (medal) handicap competitions, a comparison is made between the Reference Score recorded in the Course Scorecards in play for the competition. Those players who are

playing from Tees where the Reference Score of their Course Scorecard is higher than the minimum Reference Score in play receive the difference between their Reference Score and the minimum Reference Score in play.

Bogey, Par and Stableford Competitions

For each course scorecard (Tees) in play, a calculation of the number of points required for players to 'play to handicap' is made. Players playing from Tees where the 'Play to Handicap' points is less than the maximum calculated, receive the difference in additional strokes on their Strokes Received.

Selecting the Pars and Stroke Indexes to use for scoring

In both Stableford and Par / Bogey competitions all players must have the same scoring potential on each hole, (as it is not pre-determined which player's score may count on any one hole). This is achieved by equalising handicaps as above. It is then possible to require all players to play against a common Par and Stroke Index, i.e., that applying to one of the two courses being used, either the men's or ladies' tees, or each player may play from their own set of tees.

Where the competition is a mixed team competition, HandicapMaster offers the option to choose whether the Pars and Strokes indexes from the Men's or the Ladies scorecard is to be used, when opening the competition, the option for player to play from **Each player's own Tees** is not available as there is a single score for the team.

13.4.9 Matching Scorecards ("Countback") to resolve a Tie

Where the option **Match Scorecards ('Countback')** is selected as the method to resolve ties in a stroke-play competition, the method used in HandicapMaster follows the R&A and USGA recommendations in the Rules of Golf (Committee Procedures, Section 5A(6)).

https://www.randa.org/en/rog/2019/rules/committee-procedures/5a#6

This method is

1. For competitions over more than one round

   For 36, 54 and 72-hole multiple-round competitions, the winner is determined based on the best score for the last round.

   If the tying players have the same score for the last round, then card matching for over the last 18-holes is employed, the same as a single round competition.

2. For single-round competitions (18-hole rounds)

   The winner is determined based on the score for the last nine holes, last six holes, last three holes and finally the 18th hole in turn.

   If there is still a tie, then the last six holes, three holes and final hole of the first nine holes will be considered in turn.

3. For single-round competitions (Rounds over less than 18 holes)

   The winner is determined based on the score for the last nine holes played, last six holes played, last three holes played and finally the last hole played in turn.

See Also

- Add a new Competition Template

- Modify a Competition Template

- Copy a Competition Template

- Hide a Competition Template

- Delete a Competition Template

- The Competition Template Wizard

- Running Multiple-round and Alternative Day Competitions

- Add a new Competition Template

13.5   Opening Competitions

13.5.1   Open a New Competition

Before entering Competition Scores, it is necessary to *open* the competition. Competitions may be opened in advance of their date, or opened as and when the competition official is ready to enter the scores.

To Open a New Competition

1. On the **Competitions** drop-down menu, click **Open a New Competition**

2. Configure the competition using the Open a New Stroke-play Competition Wizard.

Notes

- The Competition Template must already be set up.

13.5.2   Delete an Opened Competition

To completely remove a competition from the Opened Competitions list

1. On the left hand task pane, select **Competitions** place.

2. On the right hand pane, double-click **Opened Competitions**.

3. Do one of the following:

    - Select the Competition and press DELETE Key, or

    - Right-click over the competition, then select **Cancel Competition**.

Notes:

- All scores entered for the competition will be deleted.

13.5.3   Change an Opened Competition

To change a competition previously opened

1. On the left hand task pane, select **Competitions** place.

2. On the right hand pane, double-click **Opened Competitions**.

3. Double-click the competition to be changed.

4. Click the **Config** button on the Enter Scores Toolbar.

5. Change the Opened Competition using the Amend Competition Configuration window.

13.5.4 The Open a New Competition Wizard

The Open a New Stroke Play Competition Wizard steps through the stages of starting a competition.

Opening the competition

1.   Do one of the following:

- Open a single competition,basing the competition on **a Competition Template**.
  You will need a competition template to have been configured to open the competition.

- Open one or more competitions, using **competitions played in the last 12 months**.
  Where you have run competitions through HandicapMaster in the last 12 months, you may repeat these competitions by opening repeats of the competitions. You may select any *closed competitions* from the last 12 months. HandicapMaster will suggest new dates for the competitions 12 months from their previous run.
  Skip to section Competitions to be repeated below.

- Open one or more competitions, using **a current opened competition**.
  When you select an already-opened competition, you can then create one or more copies of this competition for further future dates.
  Skip to section Competitions to be repeated below.

- Alternatively, you may Open a 're-entry' Competition by clicking the applicable link.

2.   Click **Next >**

Competition Template

3.   In the **Use Template** box, choose the applicable Template for this Competition.

Note: The Competition Template must already have been created using the Competition Template Wizard.

4.   Click **Next >**

Name, Date and Venue

5.   In the **Name** box, choose a name for this Competition (if the Template name is not applicable).

6.   In the **Date of Competition** box, choose the date when the competition is played. If the competition is a second round or second competition on the same day, select **PM**.

7.   In the **Rounds will be played over this Course** box, choose the venue (and course if applicable) to be used. If the Venue/Course is not listed, click **Cancel** and Enter Course Scorecard details as required.

Tees

8.   Using the **Competitors play from these Tee Markers** boxes, Select the tees used for this competition.

      Note: If a gender's tees are not displayed this indicates that the template chosen has excluded that gender.

9.   The box **Adjust Competition Handicaps (when Competitors playing from different tees)** will be displayed if the competition is over more than one set of tees. The setting will be determined from the competition template. You may override the value if required.

10.   If the Competition is a Mixed Tee Team Competition, in the **For Scoring, use Pars and Stroke Indexes from** box, choose whether to use the Pars and Stroke Indexes on the Men's or the Ladies' Scorecard (or the player's own Tees, where applicable).

11.   Click **Next >**

Competition Format

If the competition is a 27, 36, 54 or 72 competition, it may be necessary for players to use their handicaps as they were on the first day of the competition (rather than have their handicaps change from round to round). This would be determined by the organising committee.

If this is the second, third or subsequent round of the competition and Handicaps are to be held throughout the competition, then

12.   Select **Second, third or subsequent round of competition**.

13.   Tick the **Use First round Handicaps** box, and select the date of the first round of the competition in the **First Round Date** boxes.

For more information about running competitions over more than one round, see Run a Multiple Round Competition.

14.   Click **Next >**

Multiple-round Competitions

If you have selected that this competition is a *Second, Third or Subsequent Round of Competition* (on the previous page of the wizard) and the competition is a singles competition, you may choose to link this competition to other competition rounds.

By choosing to "aggregate" this round at this stage, the Player Entry leader board will be able to display the combined scores for the competition, as scores are entered.

15.   Choose whether to aggregate the round as an Alternative Day competition or a Multiple-round competition (see Competitions played over more than one round for further details), then select the previous round from the pop-up list of competitions.

16.   You may choose to give an overall name to the competition (to encompass all rounds) by clicking **Set a Name** button.

17.   Click **Next >**

Options

18.   Tick the **Players to record their Score Card Issue Number** box, if score cards have been allocated to players each with a unique number. By recording the Issue Number of each card as the score is input, it is possible to locate missing cards (I.e. cards that have not been returned) more quickly. Use the 'Analyse Score Cards Entered' list to sort scores returned, by their issue number, to locate missing cards after scores have been entered. Note: This option is ignored if Printing of Score Cards as players sign in is activated (see Configure Player Entry).

19.   Tick the **Players to Sign In before play** box if you wish players to acknowledge their entry in the competition prior to play. Players will be asked to sign in, with the time that they do recorded, so that missing cards may be more easily identified and time on the course analysed. Use the 'Analyse Score Cards Entered' list to locate players who have signed in, but failed to input their scores (See Note below).

When Applying Scores, any player who has signed in but has not entered their score will automatically be allocated a 'No Return' score.

20.   Tick the **Restrict score entry/sign-in to those players booked in (or on a Start Sheet if exists)** box to limit which players will be able to Sign In or enter a Score for the competition to those listed on a Booking Sheet or Start Sheet (See Note below).

- If a Start Sheet has been created for the competition, this will be checked in place of checking

Bookings for this competition.

- In the event that a Player is not on a Booking Sheet or Start Sheet, the Booking Sheet or Start Sheet will need to be amended to allow the player to enter their score.

- For team competitions, limiting players to those already added to a Start Sheet will enable HandicapMaster to automatically recognise the partners within a team. Only one player in the team will need to identify themselves at Sign In or Score Entry time.

21.   Tick the **Restrict Score Entry/Sign In to these Times only** box to limit the time period on the competition day that players may sign in or enter their scores. This may be helpful where two rounds of a competition are due to be played on the same day (See Note below).

22.   Tick the **Show On Leaderboard** box to allow this competition to show on the Player Entry Leaderboard, if it is configured to be used. Where the competition is being played as singles stroke-play (Medal) format, you may choose whether to show the Net scores, Gross scores, or both on the Leaderboard.

23.   Tick the **Players may enter scores online** box to allow members to enter their scores through the Master Scoreboard website. This option is available for singles competitions.

24.   Tick the **Use Bookings** box to arrange for entries to be taken for this competition, using HandicapMaster (See Note below).

25.   If you wish to save the current selections for when you next run the Open a New Competition wizard, click **Save as Defaults** button.

26.   Click **Next >**

Competition Entry Fees

If competition entry fees have been configured in the competition template, these will automatically be applied to the competition.

27.   Un-tick the **Charge Competition Entry Fee(s)** box if you wish to cancel applying fees to this competition. For example, if this is the second round of a competition, you may wish to only charge fees for entry into the first round.

The fees being applied to the competition will be displayed by the wizard.

28.   Click **Next >**

29.   Click **Finish** to complete the Open a New Stroke Play Competition Wizard

Booking arrangements

30.   If **Use Bookings** box was ticked, a Bookings template may be selected to configure HandicapMaster to collect entries into this competition.

To modify any existing template or set up a new template, click **Edit Templates** button.

Competitions to be repeated

31.   Do one of the following:

- If you are creating competitions based upon competitions played in the last 12 months:

    Tick the box alongside any competition that you would like to repeat. These competitions will be the ones that are opened.

    Click **Next >**

Confirm the names and dates that you would like to use for the new competitions.

- If you are creating competitions based upon a currently-opened competition:

Select the competition to be repeated, then click **Next >**.

Click **Add Competition...** button to add one or more competitions to be created, based upon the opened competition.

Confirm the names and dates that you would like to use for the new competitions.

32. Click **Next >**

33. Click **Finish** to complete the Open a New Stroke Play Competition wizard and open each of the selected competitions.

Note:

- The **Restrict score entry/sign-in to those players booked in (or on a Start Sheet if exists)**, **Restrict Score Entry/Sign In to these Times only** and **Use Bookings** options are available in the Gold editions of HandicapMaster.

- The **Competition Fees** facility is only available in the Gold editions of HandicapMaster.

13.6 Booking Future Competitions (Optional step)

The Bookings facility is available in the Gold editions of HandicapMaster

The *Bookings* facility allows players to book into future opened competitions (automating the Competition Entry sheet on the Clubhouse wall).

The booking list can, if required, be incorporated into a start sheet once bookings for a competition has closed.

You may allow bookings to be accepted through the Player Entry system in the Clubhouse and/or through the Master Scoreboard web site (online).

For full details, see Booking Future Competitions chapter.

13.7 Start Sheets (Optional step)

13.7.1 Create a Start Sheet

For some competitions, the Committee may have set a closing date with a view to issuing a Start Sheet (with drawn start times and pairings). A Start Sheet can be produced by entering tee time details and then entering names using the Start Sheet wizard.

Alternatively, if Competition Booking has been run for a forthcoming Competition, details of bookings received may be imported into a Start Sheet.

Entry of Competition Scores may, optionally, be restricted to only those Players who have been previously added to a Start Sheet (Gold editions only).

It is necessary to Open a Competition before a Start Sheet can be created.

To Create a Start Sheet

1. Do one of the following:

- On the **Competitions** Menu, choose **Start Sheets**... and select the Opened Competition, or

- In the Opened Competitions list, select the competition and click with the right-hand button. Click **Start Sheet**.

2. Create the Start Sheet using the Start Sheet Wizard.

See Also

- View a Start Sheet report

- Print Labels for Scorecards

- Create Scorecards

- Cancel a Start Sheet

13.7.2 The Start Sheet Wizard

The Start Sheet Wizard steps through the stages of creating a Starting Sheet.

If you have bookings enabled for the competition then the first time you run the Start Sheet Wizard you will be offered to option to import the bookings into the start sheet.

Type of Start Sheet

1. Choose the type of Start Sheet required for this competition. Select either:

One or Two Tee Starting Sheet

This is a 'traditional' Start Sheet where games start from the same Tee at different times. Can also be a 'Two Tee' start, where some games start at a second tee (the 10th Tee, for example).

Multiple Tee (Shotgun) Starting Sheet

This is a Start Sheet where all games start at the same time, but from separate Tees. This is often called a Shotgun start, as play is traditionally started from all Tees across the course with the sounding of a Shotgun or Klaxon.

2.   In the **Players Per Group** box, select the number of players in each Game. Can be 2, 3 or 4., For Pairs competitions, this will show as 2 'Teams per Group'..

3.   Tick the **Allow Players Without Handicaps** box if you wish to include players without Handicaps on the Start Sheet. Such players will be ignored when Entering or Applying Competition Scores.

4..   Tick the **Include on MasterScoreboard.co.uk** box if you wish this Start Sheet to be included when running the publish to Master Scoreboard wizard, so the starting times will be displayed on the Master Scoreboard web site.

5.   Click **Next >**

Format and Layout of Start Sheet

6.   Choose the settings that describe the Start Sheet.

For a One or Two Tee Starting Sheet,

a. In the **Games Start from** box, select the Tee used for this Competition.

b. In the **First Game starts at** box, enter the Time when the first Game will start play.

c. In the **Interval between Games** box, enter the number of minutes to allow between each Game starting.

d. In the **Number of Games** box, enter the number games (I.e. Tee Times) to display in the grid. Games may subsequently be added or removed using the **Amend Games** button on the Start Sheet Grid page.

e. Tick the **Create Two Tee Start Sheet** box if a second Tee is to be used. For example, where play will be from the 1st and 10th Tees.

If a second Tee is to be used, then

f. In the **Change To Tee** box, select which alternative/other tee is to be used. (A common practice is to play off the 1st and 10th tees, in which case the alternative tee will be the 10th)

g. Once you know how many games are to be played off the 1st tee:

- In the **From Game** box choose the Game Number at which the games switch to the alternative tee. This can be amended at any time by the use of the back button further on in the set-up.

- In the **Times Restart At** box, enter the Time which the first game starting at the second designated Tee will start.

h. If you wish to save the current selections for future Start Sheets, click **Save as Defaults** button. A separate selection of defaults may be saved for Singles, Pairs and Texas/Florida Scramble competitions.

For a Multiple Tee (Shotgun) Starting Sheet - to order games in game order

If you wish to have games 1 to 18 followed by extra games at the end of the list of games we recommend:

a. In the **All Games Start At** box, enter the time when play will start (when the Shotgun or Klaxon will be sounded to start play).

b. In the **Use Tees** boxes, select the range of Tees to be used (for example, on a 9 hole course, select 1st to 9th).

c. In the **Number of Games** box, enter the number games (I.e. Tee Times) to display in the

grid. Games may subsequently be added or removed using the **Amend Games** button on the Start Sheet Grid page.

    d. If you wish to save the current selections for future Start Sheets, click **Save as Defaults** button.

For a Multiple Tee (Shotgun) Starting Sheet - to order games in tee order with multiple games per tee

if you wish to display the games in tee order we recommend the following approach:

    a. In the **All Games Start At** box, enter the time when play will start (when the Shotgun or Klaxon will be sounded to start play).

    b. In the **Use Tees** boxes, select a range of 18 Tees to be used (or on a 9 hole course, select 1st to 9th).

    c. In the **Number of Games** box, enter the number of tees e.g. 18 or 9 games (I.e. Tee Times) to display in the grid. So the games are on tee order.

    d. Now insert games using the **Amend Games** button on the Start Sheet Grid page and select **Insert new game before:** e.g. if you wished to have a second game on tees 1 to 9 you would repeat this for tees 1 to 9.

    e. If you wish to save the current selections for future Start Sheets, click **Save as Defaults** button.

7.   Click **Next >**

Start Sheet Grid

8.   Add the Competitors in this competition to the grid. There are various ways to select Players from the HandicapMaster database.

- Use the **Amend Games** button to insert or delete Games from the grid. Note that when a player is inserted into the last available slot on the last game, HandicapMaster will automatically add a row to the grid. It is not necessary to add all of the games before adding Players.

- Use the **Auto Fill >** button to automatically populate the Start Sheet using players from a previous competition. This may be applicable when creating a Start Sheet for the second round of a 36 hole competition, for example.

- Use the **Reorder >** button to shuffle the players in the grid. Players may be shuffled randomly, or into Strokes Received order.

- Use the **Unavailable** button to mark a selected Cell, Game or Block of Games as unavailable to the competition. These cells will not be included on the Start Sheet reports.

- Use the **Save** button at any time to save the Start Sheet as it currently is shown, to the database. This can help protect from unexpected computer, power or software failure.

9.   Click **Next >**

Choice of Tees to Play From

10.   If players may choose which Tees they will play from, you may preselect which players will play from the second choice of Tees.

- Select **Players will choose which Tees they will play from** if you wish Players to select their own choice of Tees, or

- Select **These players will play from the ... Tees** if you wish to predetermine the Tees players will

play from.

11.   If preselecting Tees, tick the box alongside each player who will be playing from the alternative Tees. Click **Select >** to select a group of players in one go, according to your choice of attribute.

Complete the Start Sheet Wizard

12.   Tick the **View Start Sheets Report** box to view the Start Sheet report after the Wizard has closed.

13.   Tick the **View Scorecard Labels Report** box to view a report to print labels for players on the Start Sheet after the Wizard has closed.

Note:

The View Scorecard Labels Report option is only available in the Gold of HandicapMaster.

13.7.2.1 Add Players to the Start Sheet Grid

To add a Player to the Start Sheet Grid

1.   Select a cell by doing one of the following:

- Double-click the required cell, or

- Move to the cell using the arrow keys on the keyboard and press ENTER key.

2.   Select a player by typing the first letters of the required player's last name.

To include a Visitor who is not already known to the HandicapMaster system

1. Select the applicable cell and press ENTER key.

2. Click the **New Visitor** button to add a Visitor to the HandicapMaster database (displayed if the competition is an Open competition). This Visitor will be added to the selection window and can then be chosen for the grid.

Notes

It is possible to swap Players around in the grid using Window's 'Drag and Drop' facility. See Reorder Players in Start Sheet Grid for further details.

If a cell is marked as Unavailable you may change this as follows:

- Double-click the required cell, and select the player

- Move to the cell using the arrow keys on the keyboard and press DELETE key to make the cell available, or right-click over the cell and select Clear in the pop-up menu.

- If the Subscriptions Option has been installed as a licenced option then there is an option in the Accounting Options to check if players being added to the start sheet have an overdue subscription. In this case HandicapMaster will prompt if the player should be added to the start sheet.

See Also

- Create a Start Sheet

- View a Start Sheet report

- Print Labels for Scorecards

- Create Scorecards

- Cancel a Start Sheet

13.7.2.2 Auto-Fill Start Sheet

When creating a Start Sheet for a second or subsequent round of a competition, typically it will be necessary to populate the Start Sheet using Players from the previous round of the competition. HandicapMaster provides options to import Players from a previously applied competition round, or from another Start Sheet.

To fill the Start Sheet grid with players from a previous competition

1. Click the **Auto-Fill >** button.

2. Select **Previous Competition**.

3. In the **Leaders Go Out** box, select First or Last.

4. In the **Based On** box, select Net Scores or Gross Scores.

5. Tick **Limit to Top** and enter a number in the **Players** box if you need to limit the number of Players imported from the previous competition. This may be applicable where a cut is applied to the competition and only the leading players qualify to play the final round(s).

6. Tick the **Use Aggregated Scores for Multi-round Competitions** box if the players should be ordered by their position after two or more rounds of the same competition (i.e. their overall position in the previous competition).

7. Tick the **Retain Players in Divisions where used** box if the previous competition was played in Divisions and players should be banded in their divisions within the Start Sheet.

8. Click **Next** Button and select the applicable Competition.

To fill the Start Sheet grid with players from another Start Sheet

1. Click the **Auto-Fill >** button.

2. Select **Another Start Sheet**.

3. Tick the **Keep Players in same Games** box if you would like the players to be imported into the same (relative) position in the grid, keeping players in the same games (i.e. same pairings).

4. Click **Next** Button and select the applicable Competition.

See Also

- Create a Start Sheet

- View a Start Sheet report

- Print Labels for Scorecards

- Create Scorecards

- Cancel a Start Sheet

13.7.2.3 Reorder Players in Start Sheet Grid

To swap two players around in the Grid

1.   Select the first cell, so that it become highlighted.

2.   Whilst holding the SHIFT key down, click a second cell. The players in the two cells will be swapped over.

To randomly shuffle the players in the Grid

1.   Click the **Reorder >** button

2.   Select **Randomise Players and Groups** option

3.   Select one of

- **Randomise All Games**, or

- **Randomise Games From** and **To**

4.   For Pairs and Team competitions, tick the **Keep Partners Together** box to limit the re-ordering of players to swapping teams around. Remove the tick from **Keep Partners Together** box to create random partners for the competition.

5.   For Multiple Tee ('Shotgun') starts, tick the **Keep Players in their Groups** box to limit the re-ordering of players to swapping which groups start from which tees.

6.   Click **Next >** button

Note

- When players are randomised in the grid, HandicapMaster will ensure, where possible, no player is left on their own for a specified tee time. Where possible, at least two players will be allocated to each game that has players.

- When players positions in the Start Sheet have been randomised, HandicapMaster will then re-order the games so that those games containing the fewest players are moved to the start of the sheet (not applicable for 'Shotgun' Starting Sheets). This will ensure smaller groups are those first out. Any game where one or more cells are marked as 'Unavailable' will not be moved.

To reorder the players into their Handicap order

1.   Click the **Reorder >** button

2.   Select **Reorder Players by Handicaps** option

3.   Select one of

- **Lowest Handicaps First**, or

- **Lowest Handicaps Last**, or

- **Low-High-Low-High Handicap Sequence**

4.   Click **Next >** button

Note

When the 'Low-High-Low-High Handicap Sequence' option is used, HandicapMaster reorders the Start Sheet as follows:

Cell 1: Lowest Handicap Player

Cell 2: Highest Handicap Player

Cell 3: Second Lowest Handicap Player

Cell 4: Second Highest Handicap Player

Cell 5: Third Lowest Handicap Player

...and so on.

To reorder the players into 'balanced' groups

See how a balanced draw is created for further information about this option.

1.   Click the **Reorder >** button

2.   Select **Reorder Players into 'Balanced' Groups** option

3.   Click **Next >** button

Note

- If some individual cells have been marked as 'Unavailable', this may affect the accuracy of the results of the reordering.

To move Players up in the grid to fill any spaces

1.   Click the **Reorder >** button

2.   Select **Move Players up in Grid to Fill Spaces** option

3.   Click **Next >** button

Note

Cells in the grid that have been filled using the "Unavailable" descriptor are not moved.

See Also

- Create a Start Sheet
- View a Start Sheet report
- Print Labels for Scorecards
- Create Scorecards
- Cancel a Start Sheet

13.7.2.4 How a Balanced Draw is calculated

The Start Sheets re-order option **Reorder Players into 'Balanced' Groups** is designed to reorder the players so that each group has players with a low, a medium and a high handicap, etc. That is, each group has broadly the same mix of player abilities.

How HandicapMaster creates a balanced draw

The calculation is based on the Handicap of those players already added to the Start Sheet grid.

1. The first column in the grid is filled with players with the lowest handicaps.

2. The last column is filled with players with the highest handicaps.

3. Any *middle* columns are filled with players with handicaps in the best range(s) possible.

4. Players in each column are then randomly shuffled (column by column), to create a more random spread across the games.

Pairs Competitions

Where the Start Sheet is for a pairs competition (such as Foursomes, Four-ball, etc), HandicapMaster will balance the players in each team pairing (rather than across all four players in each Tee Time). Effectively, one player from the 50% of players with lower handicaps will be paired with one player from the 50% with higher handicaps.

Notes

- Once players have been re-ordered so there is one player from each *range* of handicaps in each group, no attempt is made to balance up the total handicaps group by group.

- If some individual cells have been marked as 'Unavailable', this can affect the accuracy of the results of the reordering. It is not recommended that a balanced draw is attempted if the grid contains isolated "unavailable" cells.

See Also

- Create a Start Sheet

- View a Start Sheet report

- Print Labels for Scorecards

- Create Scorecards

- Cancel a Start Sheet

13.7.3 View a Start Sheet Report

To View a Starting Sheet Report

1. Do one of the following:

    - On the **Competitions** Menu, choose **Start Sheets...** and run the Start Sheet Wizard. When completing the Start Sheet Wizard, tick the **View Start Sheet Report** box, or

    - In the Opened Competitions list, select the competition and click with the right-hand button. Click **View Start Sheet Report**.

2. Choose the layout and presentation of the Start Sheets report.

    In the **Style of report** box, choose one of

    - **Game Order**. This is a traditional start sheet with players listed in their games, with one player per line.

    - **Game Order (Spreadsheet layout)**. This layout shows all of the players for games on a single line, in the same layout format as the grid used in the Start Sheet Wizard.

    - **Player Order**. This layout lists all of the players of the competition in alphabetical order, alongside their Game number and Tee time.

Tick the **Show Handicaps** box to include the Player's Handicap (as at the date when the report is generated) in the Start Sheet. Also included will be player's Tee Handicap and Strokes Received. If players have a choice of Tees to play from, and their Tees have not been pre-selected, the report will be based upon all players playing from one chosen set of Tees. This option is not available when using the 'spreadsheet' report layout format.

Tick the **Show Membership Number** box to include the Player's Membership Number in the Start Sheet Report.

Tick the **Show Home Club** box to include the names of the away members' or visitors' Home Clubs alongside each away member or visitor listed in the report.

Tick the **Show Membership Category** box to include the membership category of the players alongside each player in the report.

Tick the **Draw Borders on report** box to include borders ('boxes') around each line of the report.

Tick the **Save Start Sheet details to CSV File** box if you wish the contents of the Start Sheet to be saved to a comma-separated file whilst the report is being run. The resultant file can then be opened with a program such as Microsoft® Excel. (Option available in Gold only). Notes:

a) If you are exporting records to be read by a spreadsheet program such as Excel, you may change the way 'Plus' Handicaps are exported, so the "+" prefix shows up in Excel.

b) If you have turned on the facility to export scores to Golfdirecto (Spain), then the format of the Start Sheet report export file will be amended to a format that can be imported into Golfdirecto.

In the **Add Notes to bottom of report** box enter any comments for inclusion on the Start Sheet report. By default this will contain details of the competition format, handicap allowance and the tees being used.

3.   Click **OK**.

See Also

- Create a Start Sheet

- Print Labels for Scorecards

- Create Scorecards

- Cancel a Start Sheet

13.7.4 Print Labels for Scorecards

It is possible to use a previously created Start Sheet as the basis for printing labels to stick to the competition Scorecards. There are a number of standard layouts and also a custom layout option.

Standard layout option labels can include the Player's Handicap, as well as details about the starting Tee and Time for each player.

Custom Labels can include these and a number of other items such as national ID and strokes received.

It is also possible to print directly to score cards by using one of the "Continuous Roll" labels as this will print one "label" to each sheet or score card.

Note.

The facility to print Scorecard Labels is included in the Gold of HandicapMaster.

To Print Scorecard Labels

1. Do one of the following:

   - On the **Competitions** Menu, choose **Start Sheets...** and run the Start Sheet Wizard. When completing the Start Sheet Wizard, tick the **View Scorecard Labels Report** box, or

   - In the Opened Competitions list, select the competition and click with the right-hand button. Click **Labels for Scorecards**.

2. Choose the type of Label you will be using in the **Label Type** box.

   NOTE: if you select a "Continuous Roll" label type then one label per sheet or score card will be printed. The A4 label type may be used for a Custom Layout when you wish to place the label items outside one of the other Continuous Roll label sizes, typically for direct printing to score cards.

3. Select either **Standard Layout** or **Custom Layout**.

Standard Layout

1. Choose the content of the Labels:

   Tick the **Start Time** box to include player's Start Times on the Labels (Please **Notes** below for limitations).

   Tick the **Tee** box to include which Tee player's shall start from on the Labels (Please **Notes** below for limitations).

   Tick the **Match Number** box to include the number of the player's game on the Labels (Please **Notes** below for limitations).

   Tick the **Handicaps As** box to include either the Handicap of the Players (as at the date when the Labels are printed) or the Strokes Receiveds on the Labels

   - Choose the appropriate option either **Handicap** or **Strokes Received**.

   Tick the **Home Club of Visitors** box to include the home club of the player. (Please see **Notes** below for limitations).

2. In the **Start at Label** boxes, select a Row and Column where the labels are to be printed from. This can be useful if a partially used page of labels is to be re-used, as it allows position of used labels to be skipped. Not applicable where labels on rolls are being used.

3. Click OK and the start sheet labels report will be displayed on the screen.

4. Click the **Print Report** button   to print the labels.

Custom Layout

1. Click **Design Label** to review and use the [Custom label Designer](#) to arrange the layout of items on the custom label.

2. Click OK

3. If one or more of the items on the label design are positioned outside the edge of the selected **Label Type** then a message indicating that "Some item(s) were positioned beyond the edge of the label!" is displayed. These items will be automatically excluded from the label when it is printed. Click OK to acknowledge this message.

4. Select the printer to which the custom labels should be printed. The labels are sent direct to the printer and not displayed on screen.

5. Click OK

Notes for Standard Layout

The Start Time, Tee and Match Number content options may not be available for some team competition and label size combinations due to limitations of space on the label.

The **Home Club** content option is only available when:

- The competition is open to Visitors

- The label size selected has sufficient space to include this information.

- The competition is a singles competition, it is not available for team competitions

Notes for Custom Layout

1. The font that is used for the Custom labels may be adjusted as follows:

   - On the **Reports** menu select **Layout and Options**.

   - In the Choose a Category box scroll down and select **Start Sheet: labels**

   - Then select the required font.

See Also

- [Create a Start Sheet](#)

- [View a Start Sheet report](#)

- [Create Scorecards](#)

- [Cancel a Start Sheet](#)

13.7.5 Design Custom Start Sheet Labels

It is possible to use a previously created Start Sheet as the basis for printing labels to stick to the competition Scorecards. There are some [standard layouts](#) and also a custom layout option.

Custom Labels include a range of items for each Player (Up to 4 players maximum) and some common items such as Competition name, Competition date etc.

Where a label contains details for Player A to D these player details will only be printed if the competition is a multi-player competition.

For a singles competition you would just have Player A details printed, whereas for a Greensome you would see player A and B, and for a 4 player Texas Scramble you would see player A to D details on the label, if you have selected these.

Designing a Custom Label

1. Select each item to be printed on the label. Tick **Include** to include this item when printing. Enter the distance from top left corner of the label (in Millimeters) to position the item, or drag and drop it on the example layout.

2. Tick the **Include Titling when Printing** box if you would like titling to be added to the items included

on the label to be printed. For Example with this option ticked, Handicap will be printed as "Index: 24" instead of "24", Strokes Received will be printed "Play Hcp: 24" instead of "24" etc. This can improve the appearance when printing to Labels.

3.   Some printers are unable to print to the edge of the paper. In this case you will need to enter the "hard" margin values for your printer. Each printer may have different values! Determining the actual value may require you performing a test print.

- In the **Printer Top Margin** enter the number of millimeters from the top of the paper that the printable area on the paper starts e.g. 3.8. You may type in the value or use the up and down arrows.

- In the **Printer Left Margin** enter the number of millimeters from the top of the paper that the printable area on the paper starts e.g. 1.2. You may type in the value or use the up and down arrows.

4.   Click the **Perform a test print using this layout** link to print some test data to the selected printer.

5. Click **OK** to save any changes to the design, or cancel to abandon any changes.

6. Click **OK** to start to print the labels

7. If one or more of the items on the label design are positioned outside the edge of the selected **Label Type** then a message indicating that "Some item(s) were positioned beyond the edge of the label!" is displayed. These items will be automatically excluded from the label when it is printed. Click **OK** to acknowledge this message.

8. Select the printer to which the custom labels should be printed.

9. Click **OK**

Notes

- If your printer will not print from the edge of the paper then if you select a label format that does not have margin you may find that some text is not printed. there are two options:

  1. Select a different label format that has a margin

  2. Move the items on the label down and to the right from the edge in the label designer. This will mean all labels printed will be positioned away from the top and left edge of each label.

- To determine the printer "hard" margins you may need to print a sheet of labels and measure the position of the text if you are unable to find the details in the printer documentation.

- The font used for the start sheet labels is configured in the Reporting Layout And Options and by selecting the **Start Sheets: Labels** category.

- If the competition is a team competition e.g. a Greensome, four-ball etc, then the "Player A Strokes Received", Player B Strokes Received" etc will contain the combined handicap for the format of the competition.

- For small label sizes the use of the titling option may limit the number of items that can be included on the label.

- The Label Designer window can be increased in size if using larger labels.

See Also

- Create a Start Sheet

- View a Start Sheet report

- Print Labels for Scorecards
- Create Scorecards
- Cancel a Start Sheet

13.7.6 Create Scorecards

It is possible to use a previously created Start Sheet as the basis for printing competition scorecards.

Note.

The scorecard facility is only available for *singles* competitions (not team competitions).

To create scorecards

1. Do one of the following:

   - On the **Competitions** Menu, choose **Start Sheets...** and run the Start Sheet Wizard. When completing the Start Sheet Wizard, tick the **Create Scorecards** box, or

   - In the Opened Competitions list, select the competition and click with the right-hand button. Click **Create Scorecards**.

See Also

- Create a Start Sheet
- View a Start Sheet report
- Print Labels for Scorecards
- Cancel a Start Sheet

13.7.7 Cancel a Start Sheet

To Cancel a Starting Sheet

If you wish to remove all the entrants and cancel a starting sheet from a future competition

1. Do one of the following:

   - On the **Competitions** Menu, choose **Start Sheets**... and select the Opened Competition, or

   - In the **Opened Competitions** list, select the competition and click with the right-hand button. Click **Start Sheet**.

2. Click **Next >**

3. Select **Clear Start Sheet and Start Again** and click **Next >**

4. Click **Cancel**

5. At the prompt Cancel without saving changes? Select **YES**. The start sheet will be cancelled.

See Also

- Create a Start Sheet

- View a Start Sheet report

- Print Labels for Scorecards

- Create Scorecards

- Create a Start Sheet

13.8 Enter Scores

13.8.1 Introduction

How to enter player's scores returned in a Stroke-play competition into HandicapMaster

HandicapMaster offers two alternatives for entering player's scores. These are
- the built-in Enter Scores windows available by clicking the **ENTER SCORES** button on the Toolbar, or
- the separate '**Player Entry**' system

The built-in windows have been optimised for Competition Administrators to enter scores, providing options such as editing a scorecard already entered. The Player Entry system is designed for Player's to enter their own scores, typically at a publicly available PC.

This chapter discusses entering scores using the built-in Administrator windows.

See Entering Scores using the Player Entry System for information about running and operating the Player Entry system.

Notes:

- The Player Entry system is available as an option when licencing HandicapMaster.

Contents

- Enter a Score

- Edit a Score

- Delete a Score previously entered

- Review scores entered

- Amend an Opened Competition

- Collect scores through Master Scoreboard website

13.8.2 Enter Competition Scores

To enter competitors scores from a competition

1. Do one of the following:

   - On the **Competitions** menu, click **Enter Scores**, or

   - Click the **Enter Scores** Button on the Main Toolbar.

2. Choose an Opened Competition

3. Enter scores and administer the Competition using the **Players** and **Analyse Scores Entered** lists

Notes:

- It is necessary to Open the Competition before entering scores.

- Competition scores may also be entered using the Player Entry Program

13.8.3 The Enter Scores Toolbar

When **Enter Scores** is selected and an Open Competition is chosen, the following Toolbar is displayed:

Toolbar Buttons

On the bar are the buttons as follows:

Button	Description
Enter	Enter a Score for the Player highlighted in the list.
Analyse	Analyse, and edit, scores already entered for this competition.
Find	Search for a player in the **Players** or **Analyse Scores Entered** lists (or report why a player is not listed).
Apply	**APPLY SCORES** for this competition (I.e. Close the Competition).
Config	Change the configuration and set-up of the Competition.
Access	Run the public Player Entry screens.

13.8.4 Enter a Score

To enter a score for a player in an Opened Competition

1. Do one of the following:

- Click the **Enter Scores** button on the Toolbar and choose the Open Competition if prompted.

- On the Left Hand Task Pane, select **Competitions** place, choose the Open Competition in the list, then select **Enter Scores** in the Competition Tasks list.

2.   Highlight the Player who has returned the scorecard (or use the <u>Find button to locate the player</u>).

3.   Do one of the following:

- Double-click the Player in the Players list

- Click the **Enter** button on the mini-toolbar.

- Right-click with the mouse. On the pop-up menu, select **Enter Score**.

4.   If the competition is a pairs, or team competition, repeat step (3) to select the remaining members of the team.

5.   If the competition has been configured to allow the player a choice of Tees to play from, select which Tees they used.

See Also

- <u>The Scorecard Toolbar</u>

- <u>Find a player in the competition</u>

- <u>Change which Tees a player played from</u>

13.8.5   Edit a Score previously entered

To edit a previously entered score for a player in an Opened Competition

1.   Do one of the following:

- On the **Competitions** menu, click **Analyse Scores Entered**, then **Opened Competition** and select applicable competition or

- Click the **Enter Scores** Button on the Main Toolbar,choose an Opened Competition and click the **Analyse** button, or

- On the left hand Task Pane, select **Competitions** place, then **Analyse Scores Entered** and choose an Opened Competition.

2.   Highlight the Score to be edited with a single click.

3.   Do one of the following:

- Click the **Edit** button on the mini-toolbar.

- Right-click with the mouse. On the pop-up menu, select **Edit Score**.

See Also

- <u>Change which Tees a player played from</u>

13.8.6 Delete a Score previously entered

1. Do one of the following:

    • On the **Competitions** menu, click **Analyse Scores Entered**, then **Opened Competition** and select applicable competition or

    • Click the **Enter Scores** Button on the Main Toolbar,choose an Opened Competition and click the **Analyse** button, or

    • On the left hand Task Pane, select **Competitions** place, then **Analyse Scores Entered** and choose an Opened Competition.

2. Highlight the Score to be deleted with a single click.

3. Do one of the following:

    • Click the **Cancel Score** button on the mini-toolbar.

    • Right-click with the mouse. On the pop-up menu, select **Cancel Selected Score Card**.

    • Press the DELETE key on the keyboard.

13.8.7 Find a player in the competition

When **Enter Scores** is selected and an Open Competition is chosen, you may use the **Find** button on the Enter Scores toolbar to locate a player in the list.

If the player has already signed-in or entered a score, their name will have been moved to the **Analyse Scores Entered** list. The Find option will take you to the Analyse list and locate the player in that list instead.

If the player is not eligible to enter the competition, then the Find option will advise why this player is not eligible (and therefore not listed). In some situations, you may override the ineligibility criteria and proceed to enter a score for the player.

13.8.8 Scorecard Entry Window

Competitors scores are entered using the Score Entry window.

To enter the scores for a competitor (or team)

1. Check that the Handicap indicated for Strokes Received on the Scorecard is correct for the competitor. Should this be a Stroke-play competition, the number of strokes can be adjusted to suit.

2. Enter the player's scores hole-by-hole. The Net score, number of Stableford points or Par result for each hole are shown.

3. To save the scorecard, press the **ENTER** key or click the **Save and Close** button.

Entering a Hole in One

Press **1** key followed by **ENTER** key.

Entering a score for a hole over 9 strokes

Press **1** then the second digit. For example, to enter a score of 12, press the 1 key followed by 2.

Entering a score for a hole 20 strokes or higher

Click the **20+** button and enter the applicable score.

Entering a No Return for a hole

If the player does not complete a hole, use the **ZERO** (0) or **FULL STOP** (.) key to enter a No Return.

Entering a Hole Not Played

If the player does not start a hole, use the **SLASH** (/) or **X** (x) key to enter Hole Not Played.

To correct a mistake

Use the **UP** and **DOWN** keys on the Keyboard to correct previous holes entered, as indicated alongside the buttons on the right of the screen. Over-type a score with a revised number as appropriate. Alternatively, click the hole score in error and then retype the score.

See Also:

- The Scorecard Toolbar

13.8.9 The Scorecard Toolbar
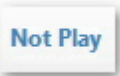
When the Scorecard window is displayed, the following Toolbar is displayed above the Scorecard.

Toolbar Buttons

On the bar are the buttons as follows:

Button	Button	Description
↵ Enter	Save	Save this Scorecard
✂	Reduce Handicap	Change the Player or Team's Strokes Received (applies to this competition only). You may view which handicaps have been adjusted by viewing the competition report 'Handicap adjustments at Score Entry'.

20+	Enter Score 20 or over	Enter a Score 20 or over for a Hole.
Not Play	Hole Not Played	Identify that the player did not play a hole (that is, they did not start the hole). Also accessed by pressing / or X keys on keyboard.
🖶	Print	Print a picture of the current Scorecard window.
✖	Cancel	Cancel entering this Scorecard.
❓	Help	Read help about entering the Scorecard.
Hi	Explain Handicap Values	Explain the calculations behind a player's Tee Handicap and Strokes Received.

13.8.10 Review Scores entered for a Competition

To review the scores entered for a competition

1. Do one of the following:

    - On the **Competitions** menu, click **Analyse Scores Entered**, then **Opened Competition** and select applicable competition or

    - Click the **Enter Scores** Button on the Main Toolbar, choose an Opened Competition and click the **Analyse** button, or

    - On the left hand Task Pane, select **Competitions** place, then **Analyse Scores Entered** and choose an Opened Competition.

Notes

- The scores entered may be printed by selecting **Report** on the mini-toolbar immediately above the list of scores. Alternatively, select **Reports** menu, then **Competition Reports**, then **Analysis of Scores Entered**.

- Competition scores may also be entered using the Player Entry Program

13.8.11 Change how an Opened Competition is being played

To change the configuration of an Opened Competition

1. On the Left Hand Task Pane, select **Competitions** place

2. Select **Opened Competitions**

3. Double-click the competition to be changed.

4. Click the **Config** button on the Enter Scores Toolbar.

5. Change the Opened Competition using the Amend Competition window.

13.8.12 The Amend Competition window

Details Tab

Name
To change the name of the competition, in the **Competition Name** box, enter a new name.

Date of Competition
To change the date of the competition, in the **Date of Competition** box, enter the revised date.

Note:

- It will only be possible to change the date of the competition if all player's for whom there is a competition score already recorded have a valid handicap on the revised date.

- If scores have already been entered, it is not possible to revise the date if the competition is a Four-Ball Better Ball competition.

Rounds will be played over this Course
To change the venue and/or the course being played for this competition, click an alternative item in the list. If the Venue/Course is not listed, click **Cancel** and Enter Course Scorecard details as required.

Configuration Tab

This tab shows the current configuration for the competition. These are the attributes of the competition determined by the Competition Template (selected when the competition is opened).

Amend

Click the **Amend** button to reconfigure the competition.

Changes will be applied to the competition. You will be asked whether you also wish to apply the changes to the competition template too.

Changes to the following items will be reflected in the opened competition:

- Eligibility of Men, Ladies or Visitors to play in the competition

- The Nature of Competition (Regular Stroke-play, Maximum Score, Stableford or Par)

- Format of play and scoring

- Handicap Allowance

- Mixed Competition Handicap Adjustment

- Use of Fractional Handicap Allowances

- and more...

Note

It is not possible to amend the competition/template if one or more scores have already been input or players already signed in, in the following circumstances:

- The change is to the number of holes played for each round

- The format of the competition is not compatible e.g. original template is singles the selected template is a team competition

"There are differences between this competition and the Template originally used" warning

Where a competition configuration does not match the template used to open the competition originally, you will see this warning displayed in red. Click the warning message to display an explanation of the differences between the competition and the template.

Use Different Template

Click the **Use Different Template** link to change the template being used by the opened competition. The attributes of the new template will be applied to the competition.

Note

It is not possible to use a different template if one or more scores have already been input or players already signed in, in the following circumstance:

- The change is to the number of holes played for each round

- The format of the competition is not compatible e.g. original template is singles the selected template is a team competition

Tees Tab

Competitors Play from these Tee Markers
To change the Tees used for the competition, select alternative Men and Ladies tee values.

Note:

- If you change the choice of Tees available to players, any scorecards already entered will be recalculated using the revised choice of Tees.

The box **Adjust Competition Handicaps (when Competitors playing from different tees)** will be displayed if the competition is over more than one set of tees. The setting will be determined from the competition template. You may override the value if required.

Where the competition is open to players playing from different sets of Tees, it may be applicable to make an adjustment to handicaps to take into account differences in the course details for the different Tees. In the **Competitors playing from different Tees** box select whether to increase or to decrease Strokes Received in this situation. The setting will be determined from the competition template and only displayed when the handicapping rules allow for adjustments. You may override the value if required.

For Team competitions under the **For Scoring, use Pars and Stroke Indexes from** box, select the scorecard to be used.

Handicapping Tab

Use First Round Handicaps

If the competition is a 36, 54 or 72 competition, it may be necessary for players to use their handicaps as they were on the first day of the competition (rather than have their handicaps change from round to

round). This would be determined by the organising committee.

If this is the second, third or subsequent round of the competition and Handicaps are to be held throughout the competition, then tick the **Use First Round Handicaps** box, and select the date of the first round of the competition in the **First Round Date** boxes.

For more information about running competitions over more than one round, see Run a Multiple Round Competition.

Options Tab

Scorecard Issue Number
To change whether players are to record their Scorecard Issue number when returning scores to the competition, amend the **Players to record their Scorecard Issue Number** box.

Players Sign-in before Play
To change whether players are to sign in to the computer before play, amend the **Players to Sign-in before play** box.

Entrants restricted to Players listed on Booking or Start Sheet
Tick the **Restrict score entry/sign-in to those players booked in (or on a Start Sheet if exists)** box to limit which players will be able to Sign In or enter a Score for the competition to those listed on a Booking Sheet or Start Sheet (See Note below).

- If a Start Sheet has been created for the competition, this will be checked in place of checking Bookings for this competition.

- In the event that a Player is not on a Booking Sheet or Start Sheet, the Booking Sheet or Start Sheet will need to be amended to allow the player to enter their score.

- For team competitions, limiting players to those already added to a Start Sheet will enable HandicapMaster to automatically recognise the partners within a team. Only one player in the team will need to identify themselves at Sign In or Score Entry time.

Score Entry Times
To change the times that players are able to sign in and or enter scores for this competition, amend the **Restrict Score Entry/Sign In to these times only** boxes.

Leader board
Tick the **Show On Leaderboard** box to allow this competition to show on the Player Entry Leaderboard, if it is configured to be used. Where the competition is being played as singles Regular Stroke Play or Maximum Score format, you may choose whether to show the Net scores, Gross scores, or both on the Leaderboard.

Entering scores online
Tick the **Players may enter scores online** box to allow members to enter their scores through the Master Scoreboard website. This option is available for singles competitions.

Note
The **Restrict score entry/sign-in to those players booked in (or on a Start Sheet if exists)** and **Restrict Score Entry/Sign In to these times only** options are only available in the Gold editions of HandicapMaster.

Bookings Tab

If Bookings have not been configured for this competition, click the **Configure Bookings** button to set up arrangements for players booking into this competition (using a Booking Template).

If Bookings arrangements have already been set up, click **Amend Bookings** to change the arrangements. Alternatively, click **Cancel Bookings** to cancel the arrangements for booking into this

competition (warning: any bookings received for this competition will be deleted).

Note

The Bookings tab is only available in the Gold editions of HandicapMaster.

Multi-round Competitions Tab

If the competition has been configured as a singles competition, then the *Multi-round competitions* tab will be displayed. You may choose to aggregate (or change the aggregation) of this round with other competitions, as part of a multiple-round competition. By choosing to "aggregate" this round at this stage, the Player Entry leader board will be able to display the combined scores for the competition, as scores are entered.

Choose whether to aggregate the round as an Alternative Day competition or a Multiple-round competition (see Competitions played over more than one round for further details), then select the previous round from the pop-up list of competitions.

You may choose to give an overall name to the competition (to encompass all rounds) by clicking **Set a Name** button (or **Change** button if an overall name is already set).

13.8.13 Change how scores are entered onto Scorecard window

By default, when entering scorecards that have more than one column of players scores on them (such as Four Ball scorecards), HandicapMaster will prompt for each player's scores for Hole 1 to be entered before requesting Hole 2 scores, etc.

However, this behaviour may be modified so that all of the scores for Player A are entered before Player B, etc. That is, the behaviour of the cursor when entering scores may be changed from row-by-row entry to column-by-column entry.

To change the behaviour of HandicapMaster when scores are being entered

1. On the **File** menu, click **Options**.

2. Click the **Competitions** tab.

3. Tick the **Cursor moves Down before Across when entering Multiple Column scores onto Scorecard** box.

4. Click **OK**.

13.8.14 Change which Tees a player played from

For some competitions you may give the players a choice of Tees to play from.

To change the Tees a player will play from/has played from

1. Do one of the following:

- On the **Competitions** menu, click **Analyse Scores Entered**, then **Opened Competition** and select applicable competition or

- Click the **Enter Scores** Button on the Main Toolbar, choose an Opened Competition and click the **Analyse** button, or

- On the left hand Task Pane, select **Competitions** place, then **Analyse Scores Entered** and

choose an Opened Competition.

2. Highlight the applicable player in the list, with a single click.

3. Do one of the following:

    - In the left hand Task Pane, click **Change Tees used by Player** task.

    - Right-click over the applicable player in the list and click **Change Tees used**.

13.8.15 Collecting scores through Master Scoreboard website

You may enable scores to be entered by players through the Master Scoreboard website.

The scores collected may then be imported into a competition without retyping the scores.

To enable scores to be recorded by members

You will need to configure your Master Scoreboard club/society account for *Individual Passwords*.

If you do not have individual passwords on your Master Scoreboard account, do this:

1. Log into the Master Scoreboard Control Panel.

2. Click **Manage Individual Passwords** button.

3. Turn on Individual Passwords. You may set the default password members will use first time they log in to the website.

To configure a competition for online Score Entry

1. When you Open a New Competition, or reconfigure an already opened competition, on the **Options** page, tick **Players may enter scores online**.

This is available for Singles competitions only.

To import scores into a competition

1. Open the competition.

2. In the list of opened competitions, double-click the applicable competition.

3. Above the list of names, click **Import** button.

13.9   Apply Scores - Calculate results and adjust Handicaps

The final stage is to apply the scores to produce competition results and adjust handicaps.

To apply scores

1.   On the **Competitions** drop-down menu, click **Apply Scores**.

2.   If required, select the competition to be closed from the list and click **OK**.

This opens the Apply Scores for Stroke-Play Competitions wizard.

The Apply Scores wizard

Competition Status

Handicapping Status

Handicap Counting Competitions are competitions where handicaps of the competitors will be revised automatically after the close of the competition. The handicapping authorities restrict the formats of competitions that are allowed to be counting.

HandicapMaster will identify whether a competition format selected may be chosen as a counting competition.

3.   Tick the **Scores count for Handicap purposes** box if scores returned in the competition should count for handicapping.

Completion of Competition

4.   Check the **Competition was ABANDONED** box if there was cause to abandon the competition (I.e. unable to complete the competition).

5.   Click **Next >**

Disqualified Scores

6.   You may choose to mark any players (or teams) as Disqualified.

    To mark a player as disqualified:.

        1. Click **Add >** button

        2. Choose the Player or team to be disqualified in the list and click **Next >** button

        3. Choose the reason for disqualification. The rule number will be displayed on the competition results report. If the required rule is not displayed in the list, or you do not wish to display the rule, select **Other, or Do Not Document**

        4. Click **Next >**

    To remove a player from the list of disqualified players

        1. Highlight the player or team in the list with a single-click and click **Remove** button

7.   Click **Next >**

Missing Scorecards

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8.   If the competition has a start sheet and any players from the start sheet have not entered a score, you may choose to record a score of "No Return - No Score Returned".

- Tick the box alongside a player's name to record a score of "No Return".

Likewise, if competition option **Restrict score entry/sign-in to those players booked in (or on a Start Sheet if exists)** has been selected, and a booking sheet exists (and no Start Sheet), you may choose to record a score of "No Return - No Score Returned" for any chosen players listed on the Booking sheet who have not entered a score.

9.   Click **Next >**

Overall Results from Multiple-round Competitions

10.   If the competition has previously been linked ("aggregated") to other competitions, choose whether to **Retain this link**. Alternatively where the competition is played over more than one round, choose whether to aggregate these scores with a previous round that has already been applied.

11.   Use the **Aggregate Competition Name** box to assign a name to appear on the aggregated results reports. This would be the name of the overall competition. If left blank the name of the first competition in the aggregation will be used.

12.   Click **Next >**

Competition Results

Which results reports to generate?

You may choose which results reports are generated for this competition.

17.   Tick the applicable boxes for the results that you wish to have generated for this competition.

Notes:

- The Net Results for the round being played will always be generated.

- For aggregated competitions, you must select at least one of *Net Results* and *Gross Results*.

Options

18.   Tick the **Add or Amend Notes on reports** box to add free form text to the results reports..

For any Competition Results report, the free form text will be applied to the selected competition, For example, if the competition is a Multiple-round competition, the notes will be applied to the particular round that was selected in the events window, when View Competition Results was chosen.

19.   Tick the **Include Home Clubs** box to have the Home Club of each player listed under their entry in the reports. Your selection will be applied to all rounds of the competition being closed.

20.   Tick the **Highlight players in report** box if you wish to choose to highlight a selection of players in colour on the results report based on **ONE** of the following criteria:

- (None)   - No highlighting the default

- Home Players

- Away Players

- Visitors

- Gentlemen

- Ladies

- Juniors

- Adults

- Seniors

- Other (1)

- Other (2)

Click **Next >** to access the highlighting options.

When any value other than (None) is selected the choice of colour to use for the highlighting is displayed and you may choose as appropriate.

Your selection will be applied to all reports for all rounds of the competition being closed. Where you have a report with highlighting already defined, this selection will be *merged* into your existing choice of highlighting as applicable.

Further highlighting options are available by changing the results report settings after the competition has been closed.

21. Click **Next >**

Process Results

13. Click **Finish** to continue.

The Competition results and any Handicap changes required will automatically be calculated at this time. The Competition will be added to the list on the Closed Competitions list.

13.10 View Results

These instructions are used to view results for a competition which has already been closed.
Additional results may be configured with different scope or formatting, providing different "views" of the
same competition.

To view the results of a competition as a Press Release

1. In the **Closed Competitions** list, select a competition and double-click or press ENTER.

2. In the [Results Report window](), choose the required report and click **View**..

To add a new Results Report

1. In the **Closed Competitions** list, select a competition and double-click or press ENTER.

2. In the Results Report window, do one of the following:

   • Click **New Report** button on the toolbar.

   • Press the INSERT key.

3. Complete the [Competition Results Wizard]() to define the new results view.

To change a Results Report

1. In the **Closed Competitions** list, select a competition and double-click or press ENTER.

2. In the Results Report window, highlight the required report with a single click and click **Edit Report**
on the toolbar.

3. Complete the [Competition Results Wizard]() to change the results view.

To remove a Results Report

1. In the **Closed Competitions** list, select a competition and double-click or press ENTER.

2. In the Results Report window, highlight the required report with a single click and do one of the
following:

   • Press the DELETE key.

   • Click **Delete** button on the toolbar**.**

To create a 'Hidden Holes' result

A 'Hidden Holes' result is typically a prize awarded to the player who takes the least, or maybe the most
(!), strokes over a limited selection of the holes played. Often, players are not told which holes will be
selected until after the scorecards have been returned.

1. In the **Closed Competitions** list, select a competition and double-click or press ENTER.

2. In the Results Report window, do one of the following:

   • Click **New Report** button on the toolbar.

- Press the INSERT key.

3. Complete the Competition Results Wizard to define the results settings, selecting option **Strokes Taken over Selected Holes**.

Notes:

- The "Full Net Results" report is an automatic reference report which cannot be removed.

- For Multi-round or aggregated competitions, there must always be at least one aggregated results report.

- For competitions open to visitors i.e. 'Open Competitions' the players home club name will automatically be included on the results available on Master Scoreboard.

13.11 The Results Reports window

When you select a competition in the *Closed Competitions* list, you will be presented with the *Results Reports* window. This window allows you to select which results report you wish to view for the chosen competition.

You may also create new reports, possibly highlighting separate prizes. For example, you may limit a report to "Seniors" and create a result with just these players, from a full field of all ages.

To view a results report

1. Do one of the following:

   - Select the required report in the list with a single click and then click the **View** button

   - Double-click the required report in the list

To view a results report as a 'Press Release'

1. Select the required report in the list with a single click.

2. Click the **PR** button on the toolbar.

To create a new results report

1. In the Results Report window, do one of the following:

   - Click **New Report** button on the toolbar.

   - Press the INSERT key.

2. Complete the Competition Results Wizard to define the new results view.

To change a results report

1. Select the required report in the list with a single click.

2. Click **Edit Report** button on the toolbar.

3. Complete the Competition Results Wizard to change the results view.

To delete a results report

1. Select the required report in the list with a single click.

2. Do one of the following:

   - Press the DELETE key.

   - Click **Delete** button on the toolbar**.**

To include or exclude a report from being published to the Master Scoreboard website

1. Select the required report in the list with a single click.

2. Click **Master Scoreboard** button on the toolbar.

To include or exclude all reports from being published to the Master Scoreboard website

Where you have more than one report for the selected competition, you may elect to show or hide all of the reports from Master Scoreboard website.

1. Click **Master Scoreboard** button on the toolbar.

2. Select **Show All Reports** or **Hide All Reports** in the drop-down menu.

To change the name of the competition result

1. Select the required report in the list with a single click.

2. Click **Edit Report** button on the toolbar.

3. Click **Change Name of Results** on the drop-down menu.

To add or amend notes displayed on the results report

1. Select the required report in the list with a single click.

2. Click **Edit Report** button on the toolbar.

3. Click **Add or amend Notes** on the drop-down menu.

To create a copy of a results report

1. Select the required report in the list with a single click.

2. Click **Edit Report** button on the toolbar.

3. Click **Create a Copy** on the drop-down menu.

13.12 The Competition Results Wizard

The Competition Results Wizard steps through the stages of configuring a Results Report.

About these Results

1. In the **Name** box, enter the name to give this result.

2. In the **Result taken from** list, select the scores that you wish to use as the basis of this report.

Notes:
- Option *Gross Result - Adjusted for Tees* used is available where a competition was played in *Regular Strokeplay* or *Maximum Score* format, was played over 18 holes and play was from two or more different Tees. This option creates an adjusted results sheet based upon adjustment to some players' gross scores, based upon which Tees they played from. This is to provide a fair basis between players playing from different Tees in the same competition. This option is available in the World Handicap System handicapping editions of HandicapMaster.

Include the scores from which Holes?

If you have chosen to created a report based upon *Strokes Taken over a selection of Holes*, choose which Holes are to be used in the report.

1. Tick the applicable **Hole** box to include the scores returned over this hole in the report.

2. Click **Add Random Hole** for the computer to randomly select an additional hole for the report.

3. In the **Leading players are those taking ... Strokes** box, elect which ordering the players' scores will be place in.

Who is to be included in the results?

These options allow the scope of the results report to be changed [Singles competitions only].

Note: The scope of the "Full Net Results" report cannot be reduced as it is a reference report. For reduced scope, create a new Net Results report instead.

1. Restrict Results by Gender:
- Tick the **Men** box if gentlemen are to be included in the results.
- Tick the **Ladies** box if ladies are to be included in the results.

2. Open Competitions *(only displayed when the competition is open to Visitors)*
- Tick **Include Visitors** if non-members are to be included in the results.
- Tick **Include Members** if members are to be included in the results (untick for a "Visitors-only" result).

3. In the 'Other restrictions on entry' section,
- Tick **Only players in selected age groups** box if some players in selected age groups are not to be included in the results. Only players who are in one of the selected Age Groups (as defined in their Membership Record) will be shown. Two of the Age Groups provided may be renamed using Options.
- Tick **Only members in selected membership categories** box if some players in selected membership categories are not to be included the results.. Select which of the membership categories to include.

- Tick **Only players with a Handicap within a selected range** box if there is a restriction on who to include based upon the player's handicap (e.g. "Only show players with a handicap of 18 or over"). Enter the range of handicaps included in the results in the **Handicaps from / to** boxes.

Notes:
- At least one of the Men/Ladies boxes must be selected
- At least one of the Members/Visitors boxes must be selected.

How will the results be presented?

This page describes how the competition results will be presented. In particular, this describes how the winners will be identified.

Overall Winners are identified as the best scores from all of the cards processed. The players at the top of the results will be identified with 'Overall Winner', 'Overall Runner-Up', 'Overall Third', etc.

Divisional winners are identified from subsets of the competitors, determined by their handicaps. The division into which a specific competitor falls depends upon the handicap of that competitor. The divisions are called DIVISION 1, DIVISION 2, DIVISION 3 and DIVISION 4, with Division 1 accepting the lowest handicapped competitors.

Divisional winners are calculated after the Overall Winners have been determined (Overall Winners are excluded from the divisions).

Divisions are not available for team competitions and *Strokes Taken over Selected Holes* report..

1. In the **Number of Overall Winners** box, enter the number of winners to be highlighted. This may be from 0 to 999 inclusive.

2. Tick **Show results in Divisions** to split the results into a number of subsets.

3. Select the **Number of Divisions** to use.

4. To allow the maximum handicap for each division to be automatically adjusted to give similar numbers of players in each division, tick **Auto-balance**. New division boundaries will be set whenever the results are recalculated.

5. For each division:

   - Set the name to use as the heading for the Division results

   - If auto-balance is not selected, set the maximum exact handicap for the division. Competitors are placed in the first division where their handicaps are below the maximum handicap.

   - Set the number of Divisional Winners to be highlighted in the division.

To manually set the maximum handicaps for each division to give approximately the same number of players in each division, click **Balance Now**. The suggested maximum handicaps can be adjusted to give the required balance of players between divisions.

6. Set the name to use as the heading for the Overall Winners results.

7. Tick the **Show top ... positions only** box to limit the displaying of results to the top X positions.

   - Enter a suitable value for the number of positions to display results to.

   - Note: the same value applies to overall winners and to divisions if presentation by divisions is also selected.

8. Tick the **List Twos** box to cause HandicapMaster to display a list of the players who scored Twos (or better!) on the results report.

- Note: This is not available for all Competitions.

9. Tick **Show home clubs** box to list the home club of each player listed in the results.

Tick **Include result on Master Scoreboard** if the result should be published to MasterScoreboard.co.uk website.

Highlighting of Players

Tick **Highlight Players in Results Report** box if you wish to display some players in a different colour in the report.

You may highlight more than one type of player. Where a player matches multiple criteria, the first match is used.

To Add a highlight:

Click on **Add**

Select the type of player to highlight and the colour to use.

Click **OK**.

Note: Each player type may only be defined once.

To Change the highlight colour:

- Select the highlight in the list.
- Click on **Change**.
- Select the colour to use.
- Click **OK**.

To remove a highlight:

- Select the highlight in the list
- Click on **Remove**
- Click **Yes** to remove the highlight.

To change the order of highlights:

- Select the highlight to change
- Click on the Up or Down arrows to change the position of the highlight in the list.

TIP: If players are likely to match several highlighting criteria, define the most specific highlight first.

Annotation

1. Tick **Show Notes on Results Reports** box if you wish to add annotation to the results report. If yes ...

2. Select how competition notes are shown in the Results Report.

- **Use this competitions' notes** - Use and amend the notes defined for the competition on which these results are based.
- **Use notes specific to this report (only)** - Define notes to be used just for this report.

3. In the **Competition Notes** or **Notes** box, enter or update the text to be included on the report.

13.13 2's returned by competitors

HandicapMaster will produce a list of those competitors who have scored twos during their rounds. These details are automatically appended to the end of the competition results reports, if selected in the competition template.

It should be noted, however, that twos information can only be displayed if the 'hole-by-hole' scores are still retained in the database. See section "The function of Housekeeping" later in this manual for further information on housekeeping hole-by-hole scores.

Reporting the most number of Twos scored over a Series of Competitions

You may report the players scoring the most number of twos (or better!) over a series of competitions using the Number of Good Holes Played report.

13.14 Create a copy of a Closed Competition

You may wish to create a copy of a closed competition and its score cards to allow you to use the score cards in a separate competition for prize results purposes.

To Create a copy of a Closed Competition

1. Locate a competition in the closed competitions list, right click and select **Create Copy**.

2. You will be asked to confirm the copy request.

3. At the end of the Copy the name of the copied competition will be displayed Click **OK**.

4. You will then be taken to the open competitions list where you may use the copy of the competition as required.

Notes:

- If the copied competition was a handicap qualifier a warning message will indicate this as follows:

  "The competition was a handicap qualifying competition.

  To avoid duplicating handicap adjustments, remember to un-tick 'Handicap Qualifying' when closing the competition copy."

- If you wish to remove some of the copied score cards then delete the score cards

- You may also wish to Use a Different Template if you need to change the format of the competition.

13.15 Competitions played over more than one round

13.15.1 Overview

HandicapMaster can process the competition results for competitions that run over more than one day. The following types of competitions are supported:

Multiple-round Competition

This competition format is

- a 27, 36, 54 or 72 hole stroke-play competition,

- each competitor is expected to play **every** round, and

- the winner is the player with the lowest strokes (or highest points) aggregated from all rounds.

An example of this is the competition type which professional golfers play regularly such as the Open Championship. Here, the winner is the competitor with the lowest stroke play aggregate score over four rounds.

HandicapMaster can accommodate a cut or competitors withdrawing (but not competitors joining the competition half way through).

HandicapMaster recognises this type of competition as a 'Multiple Round Competition'.

See Run a Multiple-round Competition.

Alternative-Day Competition

This competition format is

- a singles competition,

- each competitor has the option to play on one or other of two days,

- each competitor may play on **only one** of the days, and

- the winner is the player with the lowest strokes (or highest points), taken from the scores from both days together.

An example of this is the traditional Ladies Medal, where competitors can choose to play either the Mid-week or Weekend day (but cannot play both).

Another example of this is where there are too many entrants to play the competition in a single day. Consequently, two days of competition are run with each competitor playing one or other of the days.

HandicapMaster recognises this type of competition as 'Alternative Day Competition'.

See Run an Alternative Day Competition.

Best-of Series

This competition format is

- a series of rounds played,

- typically (but not necessarily), each round is a competition in its own right,

- each competitor has the option to play as many or as few of the rounds as he chooses,

- the overall winner is the player with the lowest strokes (or highest points), taken by aggregating the scores across all rounds, or a limited number of rounds using **only the player's best rounds**.

- a singles competition (Best-of series results for Team competitions is not available).

Many clubs give prizes for an overall winner of a number of competitions, such as the best 6 rounds in a Stableford competition or the best 5 rounds in a Medal, as examples.

Often, a 'Winter league' format allows for players to play a minimum number of rounds, but they are not required to play every weekend.

HandicapMaster recognises this type of competition as 'Best of a Series'

See Run a Best-of Series Competition.

13.15.2 Run a Multiple-round Competition

To process a Multiple-round Competition

1. Create a Competition Template

Create a Competition Template.

2. Enter and complete the first round scores

Enter and complete the first round scores, continuing as though it is a single round competition. To do this,

1. Open a New Competition

2. Enter Scores

3. Apply Scores

When Applying Scores and the **Overall Results from Multiple-round Competitions** page is displayed, select **Do not Aggregate**.

3. Enter and complete the second and subsequent rounds

Repeat the steps undertaken for the first round, but with the following considerations:

a) When Opening a New Competition for the second round:

1. If both rounds are played on the same day, select **PM** alongside the date when opening the second round competition.

2. Select the **Second, Third or Subsequent Round of Competition**.

3. If competitors are to play off the same handicap for each round in the competition (I.e retain their starting Handicap), tick **Use First Round Handicaps**, and select the date of the first round of the competition in the **First Round Date** boxes.

4. Choose to aggregate the round as a **Multiple-round competition**, then select the previous round from the pop-up list of competitions.

5. You may choose to give an overall name to the competition (to encompass all rounds) by clicking **Set a Name** button.

b) When Applying Scores, choose the **Retain this link** when asked, to retain the aggregation with the previous round(s).

Notes

- It is necessary for each Competition to have been entered as the same Format and Nature (E.g. both Stableford).

13.15.3 Run an Alternative Day Competition

To process an Alternative Day Competition

1. Create a Competition Template

Create a Competition Template.

2. Enter and complete the first round scores

Enter and complete the first round scores, continuing as though it is a single round competition. To do this,

1. Open a New Competition

2. Enter Scores

3. Apply Scores

When Applying Scores and the **Overall Results from Multiple-round Competitions** page is displayed, select **Do not Aggregate**.

3. Enter and complete the second and subsequent rounds

Repeat the steps undertaken for the first round, but with the following considerations:

a) When Opening a New Competition for the second round:

1. If both rounds are played on the same day, select **PM** alongside the date when opening the second round competition.

2. Select the **Second, Third or Subsequent Round of Competition**.

3. Choose to **Aggregate as an ALTERNATIVE DAY Competition**, then select the previous round from the pop-up list of competitions.

4. You may choose to give an overall name to the competition (to encompass all rounds) by clicking **Set a Name** button.

b) When Applying Scores, choose the **Retain this link** when asked, to retain the aggregation with the previous round(s).

Notes

- It is necessary for each Competition to have been entered as the same Format and Nature (e.g., both Stableford)

13.15.4 Run a Best-of Series Competition

A Best-of Series is defined as the overall total from 2 or more rounds, or separate competitions, played as a series. Players may be limited to how many of their rounds played count toward their total (their 'Best' scores).

To run a Best-of-Series Competition

1.   Do one of the following:

   • From the **Competitions** menu, click **Best-of Series Competitions**.

   • On the Task/Explorer tab, click **Explorer** and then **Best-of Series Competitions**.

   • Press CTRL **+** B keys together.

2.   Select the **Create a New Series** task, or press the INSERT key on the keyboard.

Title of Series

3.   In the **Name** box, enter a title for this series.

4.   In the **Description** box, enter a description for this series. The description will be displayed on the Best-of Series Competitions list.

5.   Select a form of play of competition to base this Series on (**Regular Stroke-play**, **Maximum Score**, **Stableford** or **Par**),

6.   Click **Next >**

Identify who is eligible to enter this Series

7.   You may restrict who is eligible to be included in the Series.

   • Tick the **Men** box if gentlemen are to be included.

   • Tick the **Ladies** box if ladies are to be included.

   • Tick the **Include Visitors** box if non-members are to be included.

   • Tick the **Include Past Members** box if former members are to be included.

In the 'Other restrictions on entry' section,

   • Tick **Only players in selected age groups** box if some players in selected age groups are not eligible to enter. Only players who are in one of the selected Age Groups (as defined in their Membership Record) will be allowed to be entered into the Competition. Two of the Age Groups provided may be renamed using Options.

   • Tick **Only members in selected membership categories** box if some players in selected membership categories are not eligible to enter. Select which of the membership categories are eligible to enter.

   • Tick **Only players with a Handicap within a selected range** box if there is a restriction on who may enter based upon the player's handicap (e.g. "Only players with a handicap of 18 or over may enter"). Enter the range of handicaps allowed to enter in the **Handicaps from / to** boxes.

   Note: When checking if a player is eligible to enter the competition, the player's current handicap held on the system will be checked (which could differ from the handicap held by the player at the date of the competition)

8.   Click **Next >**.

Notes:

- At least one of Men/Ladies boxes must be selected.

How players enter this series

9. Choose one of:

- **All Players** – all scores from the selected competitions are included

- **Selected Players** – players have signed up in advance for their competition scores to be included

- **Selected Scorecards from Competitions** – individual scorecards are selected for each competition (at the time the competition is included in the Series)

10. Click **Next >**.

11. If "Selected Players" is chosen, identify which players have entered by ticking the box alongside their names. Then click **OK**. To quickly locate a player in the list, just type the first letters of the player's Surname.

Which Competitions to include

12. Tick the Box alongside each Competition that you would like to include in this Series.

- Click **Select All** to quickly tick all listed Competitions.

- Click **Clear All** to quickly remove the ticks from all listed Competitions.

- If the option "Selected Scorecards from Competitions" was chosen for how players enter the Series, then as you tick a competition to be added to the Series, HandicapMaster will display a list of the entrants for that competition. Tick the boxes alongside those players whose scores are to be included in the Series and then click **OK**. To quickly locate a player in the list, just type the first letters of the player's Surname.

13. Click **Next >**

Options

14. In the **Number of Best Scores to Count** box, enter the maximum number of scores that will count to each Player's Series total.

15. Tick the **Use Gross Scores rather than Net Scores** box to base the Player's totals on their Gross rather than Net scores in each competition (Stroke-play competitions only).

16. Tick the **Show 'Best' Scores for Players** box to display the best rounds for each Player is the results report, rather than their Maximum and Minimum counting scores only.

17. Tick the **Split ties by card matching (Last 9, 6, 3, then 1 hole(s) from best scores combined)** box if you wish players with the same total score to be ordered by card matching ("count back").

- When ticked, ties are resolved as per the recommendations from the R & A, with scores over the last 9 holes being matched (combined from each of the player's best scores). If a tie still exists, scores over the last 6 holes are matched. Then last 3 holes and finally last hole.

- When not ticked, players will be displayed in alphabetical order, sharing the same "overall position".

- Note: If some of the selected competitions are run over less than 9 holes then count back will not be displayed.

- Note if all the selected competitions are over less than 9 holes then count back will be displayed

if selected, but some of the count back columns may not be applicable and may contain 0 (zero).

18.   Tick the **Include on MasterScoreboard.co.uk** box to allow this series to be uploaded to the Master Scoreboard service (when publishing to the Master Scoreboard web site).

19.   Tick **Include list of competitions** to show details of the competitions included in the series as part of the results report. You may also print this as a separate report.

20.   Tick **Include breakdown of scores** to show details of the individual competition scores for each player as part of the results report. You may also print this as a separate report.

- Only those competitions contributing to the total score are shown. For example, if the series is limited to the best 4 scores, only the best 4 scores are listed.

- A maximum of 20 best scores are shown for each player.

- Players with zero points in the series are not shown in the breakdown of scores, unless the series is based on Par (Bogey or vPar) competitions.

- Including a breakdown of the scores may result in a large report. Please check the size of the report before printing or sending by email.

21.   Click **Next >**

Divisions

22.   Tick the **Show results in Divisions** box if you wish players to be split into categories based on their handicap.

23.   Identify how many divisions (2 to 4) you would like the field split into. Enter this number in the **Number of Divisions** box.

24.   Identify the maximum handicap for all but the last of the divisions, in the applicable **Upper Handicap** boxes.

25.   Tick the **Show Overall Winners taken from any Division** box if you wish to separate out the leading players in the Best-of Series (irrespective of the Division they are placed in). Enter the number of overall winners to be separated out.

26.   Tick the **New Page for each Division in Report** box if you would like each division to be reported on its own page in the report.

27.   Choose whether the division each player is placed into is based upon their current Handicap (when the series is updated each time) by selecting **Date when result of series is calculated**, or based upon the handicap a player held on a chose date by selecting **Date of** and entering the date into the applicable box.

28.   Click **Next >**.

Notes

29.   In the **Add Notes to Report** box, enter any text that you would like to display at the bottom of the results report.

30.   Click **Next >**.

31.   Click **Finish** to run the report.

To update an existing series

1.   Do one of the following:

- On the **Competitions** menu, click **Best-of Series Competitions**

- On the [Task/Explorer tab](#), click **Explorer** and then **Best-of Series Competitions**.

- Press CTRL **+** B keys together.

2. Do one of the following:

- Double-click the chosen series

- Highlight the chosen series and click **Update a Series** in the Best-of Series Tasks

- Right-click the chosen series and select **Update Series**.

To delete a series

1. Do one of the following:

- On the **Competitions** menu, click **Best-of Series Competitions.**

- On the [Task/Explorer tab](#), click **Explorer** and then **Best-of Series Competitions**.

- Press CTRL **+** B keys together.

2. Highlight the series to be deleted.

3. Do one of the following:

- Click **Delete a Series** in the Best-of Series Tasks

- Right-click the chosen series and select **Delete Series**.

- Press the DELETE key on the keyboard.

To edit a Series Notes

1. Do one of the following:

- On the **Competitions** menu, click **Best-of Series Competitions.**

- On the [Task/Explorer tab](#), click **Explorer** and then **Best-of Series Competitions**.

- Press CTRL **+** B keys together.

2. Highlight the series to be edited.

3. Right-click the chosen series and select **Edit Notes**.

13.15.5 Run number of Birdies, Twos, etc Competition

13.15.5.1 Introduction

Run 'Number of Birdies ('Birdie Trees'), Number of Twos, etc., competitions

A "Number of 'good' holes played" report is a report of the players scoring the most number of 'good' holes (such as Birdies (or better)) over a series of competitions.

This chapter describes the process of creating a report.

Overview of 'Number of Good Holes Played' report in HandicapMaster

The typical stages of running 'Good Holes Played' competition are

1. Create the report in HandicapMaster.

2. Run one or more stroke-play competitions.

3. Update the report with the competition scores.

4. Reprint the updated report.

Contents

- Creating the 'Number of Good Holes Played' Report
- The 'Number of Good Holes Played' Report Wizard
- Adding Competitions to the 'Number of Good Holes Played' Report
- Change format of a 'Number of Good Holes Played' Report
- Edit 'Number of Good Holes Played' Report Notes
- Delete a 'Number of Good Holes Played' Report

13.15.5.2 Creating a 'Number of Good Holes Played' Report

To start a new report

1. On the **Reports** menu, click **Competition Reports,** then **Number of 'Good' Holes Played...**

2. Select the **Create a New Report** task, or press the INSERT key on the keyboard.

3. Create the report using the 'Number of Good Holes Played' Report Wizard.

See Also

- The 'Number of Good Holes Played' Report Wizard
- Adding Competitions to the 'Number of Good Holes Played' Report
- Change format of a 'Number of Good Holes Played' Report
- Edit 'Number of Good Holes Played' Report Notes
- Delete a 'Number of Good Holes Played' Report

13.15.5.3 The 'Number of Good Holes Played' Report Wizard

The 'Number of Good Holes Played' Wizard steps through the stages of starting or amending a Report.

Which Type of Scores to be reported?

1. In the **Title** box, enter a title for this report.

2. Optionally, in the **Description** box, enter a description of this report.

3. In the **Type of scores to report** list, select **Birdies** (or other choice of scoring). This is the level at which scores will be considered to be 'Good'. There is a further option later to include scores better than this if required.

4. Click **Next >**

Who to include in the Report

5. Choose which members to be included in the report..

6.　Tick the **Include Past Members** box if Past Members are to be included in the results.

7.　Tick the **Include Visitors** box if Visitors are to be included in the results.

8.　Click **Next >**

Options

9.　Tick the **Limit Report to Players with Current (Exact) Handicap** box to restrict the report to players either below or above a certain Handicap value. HandicapMaster will use Player's current handicaps at the time the Wizard is run.

10.　Tick the **Show Winners Down to Position** box to restrict the report to only the leading players (players scoring the most Birdies). HandicapMaster will include all players tying for the position chosen.

11.　Tick the **Include on MasterScoreboard.co.uk** box to allow this series to be uploaded to the MasterScoreboard service (when publishing to the MasterScoreboard web site).

12.　Tick the **Include any scores Better than <various> in Report** box to include scores better than Birdies (or other choice of scoring) in the counts in the report. This option is not displayed if the choice of scoring is Holes in One

13.　Tick the **Show when and where achieved** box to include details at which holes, (and date and competition), each Birdie (or other 'Good' Hole) was achieved.

　　　　Note: This additional information is not included in the report when published to, and displayed on, Master Scoreboard.

14.　In the **Add Notes to Report** box, enter any text that you would like to display at the bottom of the results report.

15.　Click **Next >**

Completing the 'Number of Good Holes Played' Wizard

16.　Click **Finish** to run the report.

How to run a Birdie Tree for two separate Handicap ranges (say "Silver" and "Bronze")

In this situation, effectively two separate Birdie Tree's are run. Create two separate series, and limit each one to either below or above chosen handicap values.

For example, say "Silver" and "Bronze" Tree's are being run with a handicap split at 28. Here select series 1 and provide a title like "Birdie Tree - Silver Division". Choose the applicable competitions. In the options section, tick **Limit Report to Players with Current (Exact) Handicap** box and select "Below" and "28.0". Create this report.

Now re-run the wizard and select series 2. Provide a title like "Birdie Tree - Bronze Division". Choose the applicable competitions. In the options section, tick **Limit Report to Players with Current (Exact) Handicap** box and select "Above" and "27.9". Create this report.

Don't forget to ensure all players fall into one or other of the series, by choosing handicap values 0.1 different from each other.

See Also

- Creating the 'Number of Good Holes Played' Report

- Adding Competitions to the 'Number of Good Holes Played' Report

- Change format of a 'Number of Good Holes Played' Report

- Edit 'Number of Good Holes Played' Report Notes

- Delete a 'Number of Good Holes Played' Report

13.15.5.4 Adding Competitions to a 'Number of Good Holes Played' Report

You must add competition scores to the report, so they are included in the analysis. These scores may be from stroke-play competitions that have been closed.

To add (or update) scores to an report

1. On the **Reports** menu, click **Competition Reports,** then **Number of 'Good' Holes Played...**

2. Do one of the following:

- Double-click the chosen report,

- Highlight the chosen report and click **Update a Report** in the 'Good Holes' Report Tasks

- Right-click the chosen report and select **Update Report**.

3. The *Select Competitions to be included in the Report Analysis* window is displayed. Use this window to add or update competitions to be included in the report by ticking the box alongside all competitions that you wish to include in the analysis.

See Also

- Creating the 'Number of Good Holes Played' Report

- The 'Number of Good Holes Played' Report Wizard

- Change format of a 'Number of Good Holes Played' Report

- Edit 'Number of Good Holes Played' Report Notes

- Delete a 'Number of Good Holes Played' Report

13.15.5.5 Change format of a 'Number of Good Holes Played' Report

To change the format of an Order of Merit competition already created

1. On the **Reports** menu, click **Competition Reports,** then **Number of 'Good' Holes Played...**

2. Highlight the report to be changed.

3. Do one of the following:

- Click **Amend Report Format** in the 'Good Holes' Report Tasks

- Right-click the chosen report and select **Amend Report Format**.

See Also

- Creating the 'Number of Good Holes Played' Report

- The 'Number of Good Holes Played' Report Wizard

- Adding Competitions to the 'Number of Good Holes Played' Report

- Edit 'Number of Good Holes Played' Report Notes

- Delete a 'Number of Good Holes Played' Report

13.15.5.6 Edit 'Number of Good Holes Played' Report Notes

To edit the notes of 'a Number of Good Holes Played' Report

1. On the **Reports** menu, click **Competition Reports,** then **Number of 'Good' Holes Played...**

2. Highlight the report to be changed.

3. Right-click the chosen report and select **Edit Notes**.

4. Edit the notes and click **OK** to save them.

See Also

- Creating the 'Number of Good Holes Played' Report
- The 'Number of Good Holes Played' Report Wizard
- Adding Competitions to the 'Number of Good Holes Played' Report
- Change format of a 'Number of Good Holes Played' Report
- Delete a 'Number of Good Holes Played' Report

13.15.5.7 Delete a 'Number of Good Holes Played' Report

To delete a 'Number of Good Holes Played' Report

1. On the **Reports** menu, click **Competition Reports,** then **Number of 'Good' Holes Played...**

2. Highlight the report to be deleted.

3. Do one of the following:

   - Click **Delete a Report** in the 'Good Holes' Report Tasks

   - Right-click the chosen report and select **Delete Report**.

See Also

- Creating the 'Number of Good Holes Played' Report
- The 'Number of Good Holes Played' Report Wizard
- Adding Competitions to the 'Number of Good Holes Played' Report
- Change format of a 'Number of Good Holes Played' Report
- Edit 'Number of Good Holes Played' Report Notes

13.15.6 Gross and Net Results from multiple round competitions

For example: Your club championship is a 36 holes scratch medal. However the first 18 holes is also a Net competition.

If you run the main competition as a handicap competition in HandicapMaster and aggregate both

rounds of the 36 hole competition, HandicapMaster   will automatically generate the Net results . When you apply scores you will have the choice of choosing whether to generate Gross Results (each separate round), and Gross results (overall 36 hole result).

To View Results

Do one of the following:

- On the **Competitions** menu, click **View Competition Results**, or

- In the **Closed Competitions** list, select a one of the rounds of the multiple round competition and double-click or press Enter

- In a Player's **Handicap Record** (Table format), select a competition and double-click or press Enter

The Results Report window   window will be displayed.

HandicapMaster will display a list of available reports that have been generated from the competition.

Choose the required report and click **View**

For multiple round competitions you will see a section **Aggregated Results** for the overall results. Select **Net** or **Gross Scores Result** as appropriate

The section **Selected Round Only** will allow you to obtain results from the round you selected from the closed competitions list.

If this was the first round and you want scratch results, select the **Net Scores Result** option. To view results of subsequent rounds return to the **Closed Competitions** list and select the required round.

To add a new Results Report

For a competition which has already been closed additional results may be configured with different scope or formatting, providing different "views" of the same competition without the need to undo and re-apply the scores.

1. In the **Closed Competitions** list, select a competition and double-click or press ENTER.

2. In the Results Report window, do one of the following:

- Click **New Report** button on the toolbar.

- Press the INSERT key.

3. Complete the Competition Results Wizard to define the new results view

13.16 Re-entry Competitions

13.16.1 Introduction

'Re-entry' competitions are stroke-play competitions where players are entitled to return more than one scorecard (up to one per day) and their best score will count towards the competition results.

These competitions would, typically, be played over a week, or month, say.

You may create 're-entry' competitions quickly and easily in HandicapMaster. These allow play to be configured in all of the four common stroke-play formats, but have some limitations.

The following are NOT available with re-entry competitions;

- Competition Templates

- Team formats of play

- Booking into re-entry competitions

- Start Sheets

- Charging competition fees

- Displaying a Leader board

Contents

- Open a Re-entry Competition

- The Stroke-play Re-entry Competition Wizard

13.16.2 Open a Re-entry Competition

Before entering Competition Scores, it is necessary to *open* the competition. Competitions may be opened in advance of their date, or opened as and when the competition official is ready to enter the scores.

To Open a New Competition

1. On the **Competitions** drop-down menu, click **Open a New Competition**

2. Click **Next >**

3. Click **Open a Re-entry Competition** link.

4. Configure the competition using the Stroke-play Re-entry Competition Wizard

Notes

- The Competition Template must already be set up.

See Also

- Introduction

- The Stroke-play Re-entry Competition Wizard

13.16.3 The Stroke-play Re-entry Competition Wizard

The Stroke Play Re-entry Competition Wizard steps through the stages of starting a re-entry style competition.

Name and Format of Play

In the **Name** box, choose a name for this Competition.

From the **Form of play** list, select the format of play from the available options. These are Regular Stroke Play, Maximum Score, Stableford and Par/Bogey (Also called vPar). If you select *Maximum Score*, choose the **Maximum** score that each player may record on any single hole.

Who may enter this competition

You may restrict who is eligible to play in the competition. This will influence which players are offered as entrants to competitions.

- Tick the **Men** box if gentlemen are eligible to play.

- Tick the **Ladies** box if ladies are eligible to play.

If the competition is an "open" competition (I.e. Non-members may enter), tick the **Include Visitors** box.

In the 'Other restrictions on entry' section,

- Tick **Only players in selected age groups** box if some players in selected age groups are not eligible to enter. Only players who are in one of the selected Age Groups (as defined in their Membership Record) will be allowed to be entered into the Competition. Two of the Age Groups provided may be renamed using Options.

- Tick **Only members in selected membership categories** box if some players in selected membership categories are not eligible to enter. Select which of the membership categories are eligible to enter.

- Tick **Only players with a Handicap within a selected range** box if there is a restriction on who may enter based upon the player's handicap (e.g. "Only players with a handicap of 18 or over may enter"). Enter the range of handicaps allowed to enter in the **Handicaps from / to** boxes.

  Note: When checking if a player is eligible to enter the competition, the player's current handicap held on the system will be checked (which could differ from the handicap held by the player at the date of the competition when entering scores into a past competition).

Note:
At least one of Men/Ladies boxes must be selected.

Holes being Played

In the **Play will be over** box, select which holes on the Course Scorecard will be used.

If the holes selected for the round is 'A Selection of Holes', choose the holes to be played by ticking the application boxes. A minimum of 1 hole is required.

When and where players may record scores

In *Dates when players may play* section, add authorised dates to the list. Players will be limited to returning scores only on the nominated dates.

Click the **Add Date** button to add a single date to the authorised dates list.

Click the **Add range of Dates** button to add a block of consecutive dates to the authorised dates list.

To remove a date or dates from the authorised dates list, either

- Highlight a date in the list, click the **Remove Date...** button and then click the **Remove Selected Date** option to remove this date, or

- Click the **Remove Date...** button and then click the **Remove all <day> Dates** option to remove all dates matching the *<day>* day of week from the list.

In the **Rounds will be played over this Course** box, choose the venue (and course if applicable) to be used. If the Venue/Course is not listed, click **Cancel** and Enter Course Scorecard details as required.

Tees

Using the **Competitors play from these Tee Markers** boxes, Select the tees used for this competition.

Note: If a gender's tees are not displayed this indicates that the template chosen has excluded that gender.

The box **Adjust Competition Handicaps (when Competitors playing from different tees)** will be displayed if the competition is over more than one set of tees. The setting will be determined from the competition template. You may override the value if required.

Options

In the **Allowance** box, select the Handicap allowance to apply for this competition. This will be used for competition ranking purposes, but does not affect scores when applied to Handicap records (see ' Scores count for Handicap purposes' option), and is applied to the player's Strokes Received.

Tick the **Scores count for Handicap purposes** box if scores returned in the competition should count for handicapping.

Tick the **Players to Sign In before play** box if you wish players to acknowledge their entry in the competition prior to play. Players will be asked to sign in, with the time that they do recorded, so that missing cards may be more easily identified and time on the course analysed. Use the 'Analyse Score Cards Entered' list to locate players who have signed in, but failed to input their scores (See Note below).

When Applying Scores, any player who has signed in but has not entered their score will automatically be allocated a 'No Return' score.

Tick the **Include on Fixture Lists** box if you wish the competition to be listed on each of the authorised dates when creating a Fixture List report and when publishing to Master Scoreboard website.

Tick the **Players may enter scores online** box to allow members to enter their scores through the Master Scoreboard website. This option is available for customers using the Master Scoreboard online scoring system 'extension'.

If the competition is being played over a course of less than 18 holes, tick the **Use Stroke Indexes of 1 to *n* for holes in play** box to adjust the Stroke Index table for this competition so that the lowest stroke index values are allocated to the holes in play. The ordering of Indexes, for these holes in play, will be retained from the original Stroke Index table saved in the Course Scorecard.

Presentation of Results

This page describes how the competition results will be generated and presented. In particular, this describes how the winners will be identified (highlighted).

Overall Winners are identified as the best scores from all of the cards processed. The players at the top of the results will be identified with 'Overall Winner', 'Overall Runner-Up', 'Overall Third', etc.

Divisional winners are identified from three subsets of the competitors. Ranges of handicaps determine these subsets. The division into which a specific competitor falls depends upon the handicap of that competitor. The divisions are called DIVISION 1, DIVISION 2, DIVISION 3 and DIVISION 4, with Division 1 accepting the lowest handicapped competitors.

Divisional winners are calculated after the Overall Winners have been determined (Overall Winners are excluded from the divisions).

In the **Number of Overall Winners** box, enter the number of winners to be highlighted. This may be from 0 to 999 inclusive.

To split the field of competitors into Divisions, tick the **Show results in Divisions** box. Then ...

Identify how many divisions (2 to 4) you would like the field split into. Enter this number in the **Number of Divisions** box.

To allow the maximum **Handicap** for each division to be automatically adjusted to give similar numbers of players in each division, tick **Auto-balance**. New division boundaries will be set whenever the results are calculated, and may be different for each type of result.

For each division:

- Set the name to use as the heading for the Division results if the default is not suitable.

- If auto-balance is not selected, set the maximum Handicap for the division. Competitors are placed in the first division where their Handicaps are below the maximum Handicap .

- Set the name to use as the heading for the Overall Winners results if the default is not suitable.

In the **Number of Winners in each Division** box, enter the number of Divisional winners to be highlighted in each division. This may be from 0 to 999 inclusive.

Tick the **Match Scorecards ("Countback")** box to cause HandicapMaster to automatically resolve ties using a card countback.

With this option selected, scorecards are compared in an attempt to split the tie. See Matching Scorecards ("Countback") to resolve a Tie for further details.

If the option is not selected, or if count-back has not produced a result, HandicapMaster prompts for the tie to be decided manually (by whatever means the competition organisers have previously declared). In this case, ties are only decided for the overall prize-winning positions.

Tick the **Show top ... positions only** box to limit the displaying of results to the top placed players and teams. Enter a suitable value for the number of positions to display results to.

Notes:

- When presentation of results are limited to the top X positions the limit value applies to overall winners and to divisions if presentation by divisions is also selected.

- The limit will be automatically applied on the Master Scoreboard[****]service if this is being used by your organisation.

Tick the **List Twos** box to cause HandicapMaster to display a list of the players who scored Twos (or better!) on the results report.

See Also

- Introduction

- Open a Re-entry Competition

13.17 Order of Merit and Eclectic Competitions

13.17.1 Order of Merit Competitions

13.17.1.1 Introduction

Operating Order of Merit Competitions

An Order of Merit is a calculation of the 'best player or players' from a set of competitions. It is sometimes called 'Golfer of the Year'.

You may calculate an Order of Merit based upon positions players achieve in Competitions, or the equivalent number of Stableford points they score in the competitions. Results are based upon allocating points to each player for each competition they complete.

Up to eight different points 'Plans' may be used, enabling a different number of points to be awarded for different categories of Competition.

This chapter describes the process of running an Order of Merit competition.

Overview of running an Order of Merit competition in HandicapMaster

The typical stages of running an Order of Merit competition are

1.   Create the Order of Merit competition in HandicapMaster, defining how points will be allocated (including 'plans').

2.   Run one or more stroke-play competitions

3.   Update the Order of Merit with the competition scores.

4.   Reprint the Order of Merit results.

Contents

- Creating an Order of Merit Competition

- Setting up an Order of Merit Plan

- Adding or Updating scores for an Order of Merit

- Changing the format of an existing Order of Merit

- Deleting an Order of Merit Competition

- Stop an Order of Merit showing on Master Scoreboard

13.17.1.2 Creating an Order of Merit Competition

To start an Order of Merit Competition

1.   Do one of the following:

- On the **Reports** menu, click **Competition Reports,** then **Order of Merit**

- On the Task/Explorer tab, click **Explorer** and then **Order of Merit Competitions**.

2.   Select the **Create a New Order of Merit** task, or press the INSERT key on the keyboard.

3.   Create the Order of Merit competition using the Order of Merit Competition wizard.

13.17.1.3 The Order of Merit Competition Wizard

The Order of Merit Competition Wizard steps through the stages of starting or amending a competition.

Name and Nature of Order of Merit Competition

1.   In the **Name** box, enter a title for this Order of Merit.

2.   In the **Description** box, enter a description for this Order of Merit. The description will be displayed on the Order of Merit Competitions list.

3.   In the **Type of Competition** section, chose one of

- **How many Stableford Points players score**. Points will be awarded for each competition the player plays in, equivalent to the number of Stableford Points their competition scores would achieve.

- **Where players finish in competitions**. Points will be awarded according to the overall positions a player achieves in competitions, based on award structures set up in 'plans'.

4.   Click **Next >**.

How Players have entered this Competition

5.   If players have been asked to sign-up for the Order of Merit in advance of any stroke-play competitions being played, tick the **Players have signed up in Advance** box.

6.   You may restrict who is eligible to be included in the Order of Merit.

- Tick the **Men** box if gentlemen are to be included.

- Tick the **Ladies** box if ladies are to be included.

- Tick the **Visitors** box if non-members are to be included.

In the 'Other restrictions on entry' section,

- Tick **Only players in selected age groups** box if some players in selected age groups are not eligible to enter. Only players who are in one of the selected Age Groups (as defined in their Membership Record) will be allowed to be entered into the Competition. Two of the Age Groups provided may be renamed using [Options](#).

- Tick **Only members in selected membership categories** box if some players in selected membership categories are not eligible to enter. Select which of the membership categories are eligible to enter.

- Tick **Only players with a Handicap within a selected range** box if there is a restriction on who may

enter based upon the player's handicap (e.g. "Only players with a handicap of 18 or over may enter"). Enter the range of handicaps allowed to enter in the **Handicaps from / to** boxes.

Note: When checking if a player is eligible to enter the competition, the player's current handicap held on the system will be checked (which could differ from the handicap held by the player at the date of the competition).

7.   Click **Next >**.

8.   If "Players have signed up in Advance" is selected, identify which players have entered by ticking the box alongside their names. Then click **OK**. To quickly locate a player in the list, just type the first letters of the player's Surname.

Notes:

- At least one of Men/Ladies boxes must be selected.

- If points are awarded based on where players finish in competitions and players are signed up in advance or players' eligibility is restricted, the competition positions are recalculated using just the selected or eligible players. For example, the player from the selection who has the best score is awarded Order of Merit points for first place, regardless of the player's actual position in the competition results.

Points 'Plans'

9.   Up to eight separate 'Plans' may be configured.

These can be used to award different numbers of points depending on the importance of a competition. Choose whether you would like to award a minimum number of points to players each time they play in an Order of Merit qualifying competition. These are known as 'appearance' points. If you are awarding points based on where players finish in a competition, set up the plan by allocating points to positions in a competition. See [Setting-up the Plan](#) for more details.

10.   Click **Next >**.

Scorecards from Stroke-Play Competitions

If scores are collected from stroke-play competitions and players have not been selected in advance, you may choose whether to include all scorecards from competitions or selected scorecards only.

11.   Select either

- **Add All Scorecards** to use the scores of all the players in the competition

- **Add Selected Scorecards Only** to choose which competition scores are used.
  Scorecards are selected for each competition at the time that the competition is included in the Order of Merit.

12.   Click **Next >**.

Note: If points are awarded based on where players finish in competitions and only selected scorecards are used, the competition positions are recalculated using just the selected scorecards. For example, the scorecard from the selection with the best score is awarded Order of Merit points for first place, regardless of the actual position in the competition results.

Options

13.   Tick the **Limit Players to their Best Scores only** box if you wish to limit the number of scores each player can contribute to their Order of Merit total, using their highest points earning competitions. When selected, the Order of Merit report includes the individual points scores from each competition for each player, in ascending order.

14. Tick the **Use Gross Scores rather than Net Scores** box to base the points allocated on their position in the competition Gross results rather than Net results in each competition.
Note: This option is not available when the type of competition has been selected as *How many Stableford Points players score*.

15. Tick the **Where two or more players tie, share available points equally** box if you wish players who have returned the same score to be awarded the same points (that is, 'Countback' is not considered when determining their position in the results in the competition). In this situation, the average of the points that would have been allocated across these players are is calculated and awarded to the tied players.
Note: This option is not available when *Use Overall Results for 'Multiple Round' or 'Alternative Day' competitions* option has been selected.

16. Tick the **Use Overall Results for 'Multiple Round' or 'Alternative Day' competitions** box if, for competitions played over more than one round, you wish to award points on the basis of the overall result of the competition, rather than the individual rounds. This is only applicable when points are being awarded on the basis of where players finish in competitions.
Note: This option is not available when *Where two or more players tie, share available points equally* option has been selected.

17. Tick the **Include on MasterScoreboard.co.uk** box if you wish this Order of Merit report to be included when running the publish to Master Scoreboard wizard, so the results will be displayed on the Master Scoreboard web site.

18. In the **Past Members and Players without a current handicap** box, choose how to award Order of Merit points when players lose their current handicap or are no longer Members. Options are

    - **Allocate Points to these Players and show them in the report**
    Use this option to keep these players in the Order of Merit report, retaining any points they have previously won.

    - **Allocate Points to these Players, but don't show them in the report**
    Use this option to hide these players from the Order of Merit report, but do not strip them of their points and do not reallocate their points to any other player in their absence.

    - **Ignore these Players (re-allocating any Points previously awarded to them)**
    Use this option to remove these players from the report, and reallocate their points to other players. The reallocation will be on the basis that they never competed in any of the Order of Merit competitions.

19. Tick the **Include players with zero points in report** box if you wish to show all players from the qualifying competitions in the report, even those yet to win any Order of Merit points.

20. Tick **Include list of competitions** to show details of the competitions included in the series as part of the results report. You may also print this as a separate report.

21. Tick **Include breakdown of scores** to show details of the individual competition scores and additional points awarded for each player as part of the results report. You may also print this as a separate report.

    - Only those competitions contributing to the total score are shown. For example, if the Order of Merit is limited to the best 4 scores, only the best 4 scores are listed.

    - Competition scores of zero points are not shown in the breakdown of scores.

    - Players with zero points in the Order of Merit are not shown in the breakdown of scores.

    - Including a breakdown of the scores may result in a large report. Please check the size of the report before printing or sending by email.

22. Click **Next >**.

23. Tick the **Show results in Divisions** box if you wish players to be split into categories based on their **Handicap** at the time the Order of Merit results are created.

24. Identify how many divisions (2 to 4) you would like the field split into. Enter this number in the **Number of Divisions** box.

25. Identify the maximum handicap for all but the last of the divisions, in the applicable **Upper Handicap** boxes.

26. Tick the **Show Overall Winners taken from any Division** box if you wish to separate out the leading players in the Order of Merit (irrespective of the Division they are placed in). Enter the number of overall winners to be separated out.

27. Tick the **New Page for each Division in Report** box if you would like each division to be reported on its own page in the report.

28. Click **Next >**.

Notes

29. Enter any **Notes** that you would like to be displayed at the bottom of the Order of Merit report, when printed.

30. Click **Next >**.

31. Click **Finish** to create or update the Order of Merit.

See Also

- Setting up an Order of Merit Plan

- Adding or Updating scores for an Order of Merit

- Changing the format of an existing Order of Merit

- Edit Order of Merit Competition Notes

- Deleting an Order of Merit Competition

- Stop an Order of Merit showing on Master Scoreboard

13.17.1.4 Set up an Order of Merit Plan

To set up or amend a Plan

1. Do one of the following:

    - On the **Reports** menu, click **Competition Reports,** then **Order of Merit**

    - On the Task/Explorer tab, click **Explorer** and then **Order of Merit Competitions**.

2. Highlight the Order of Merit competition to be changed.

3. Do one of the following:

    - Click **Amend Order of Merit Format** in the Order of Merit Tasks

    - Right-click the chosen Order of Merit Competition and select **Amend Order of Merit Format**.

4. In The Order of Merit Competition Wizard, click **Next >** until you get to the 'Plans' page.

5. In the **Plan** box, choose a plan number

- Tick the **Award 'Appearance Points' to players in the Competition** box, if you wish to allocate a set number of points to each player for playing in a competition.

- Tick the **Include 'Appearance Points' to players who were disqualified** box, if you wish the Appearance Points to also be allocated to players who have been disqualified in a competition.

- If you have chosen to allocate points based on the position a player finishes in, in a competition, then

- Click **Add** button to allocate a set number of points for finishing in a particular position in the competition,

- Select a 'position' in the list and click **Amend** button to change the points allocated for that position,

- Select a 'position' in the list and click **Delete** button to no longer allocate any points for that position,

- Click **Defaults** button to pre-allocate points based on factory defaults.

- Click **Copy** button to set appearance points, plan options and pre-allocate points based on a plan in a previous Order of Merit. Select the plan to copy and click on **OK**.

- Tick the **Include Descending Points for each place** box to cause the plan to award 1 point for the last placed competitor, 2 points for the last-but-one competitor, up to <number> points for the first place competitor (where <number> is the number of competitors in the competition). These points are in addition to any that are identified in the list.

See Also

- Creating an Order of Merit Competition

- Adding or Updating scores for an Order of Merit

- Changing the format of an existing Order of Merit

- Edit Order of Merit Competition Notes

- Deleting an Order of Merit Competition

- Stop an Order of Merit showing on Master Scoreboard

13.17.1.5 Adding or updating scores to an Order of Merit

You must add competition scores to the Order of Merit, so they are included in the analysis. These scores may be from stroke-play competitions that have been closed.

To add (or update) scores to an Order of Merit

1. Do one of the following:

    - On the **Reports** menu, click **Competition Reports,** then **Order of Merit**

    - On the Task/Explorer tab, click **Explorer** and then **Order of Merit Competitions**.

2. Do one of the following:

- Double-click the chosen Order of Merit Competition

- Highlight the chosen Order of Merit Competition and click **Update an Order of Merit** in the Order of Merit Tasks

- Right-click the chosen Order of Merit Competition and select **Update an Order of Merit**.

3.   The Update Order of Merit Scores window is displayed. Use this window to add or update scores included in the Order of Merit.

See Also

- Creating an Order of Merit Competition

- Setting up an Order of Merit Plan

- Changing the format of an existing Order of Merit

- Edit Order of Merit Competition Notes

- Deleting an Order of Merit Competition

- Stop an Order of Merit showing on Master Scoreboard

13.17.1.6 The Update Order of Merit Scores window

The Update Order of Merit Scores window defines which scores are included in an Order of Merit analysis.

> **Tip:**
>
> The size of this window may be increased by dragging the edges of the window to form a larger window.

To add a competition to the Order of Merit

1. Select the **Competitions** tab

2. Place a tick in the box alongside the competition.

Notes:

- If the option "When adding Scores from Stroke-play competitions... Add Selected Cards Only" was chosen when creating the Order of Merit competition, then as you tick a competition to be added to the Order of Merit, HandicapMaster will display a list of the entrants for that competition. Tick the boxes alongside those players whose scores are to be included in the Order of Merit and then click **OK**. To quickly locate a player in the list, just type the first letters of the player's Surname.

- Competitions are only listed if players who are eligible to be included in the Order of Merit were also eligible for entry into the competition. For example, a competition which is only open to Men would not be listed for an Order of Merit which only includes Ladies. However, a mixed competition would be listed, as Ladies were eligible for entry into the competition.

To remove a competition from the Order of Merit

1. Select the **Competitions** tab

2. Remove the tick from the box alongside the competition

To change a Plan number for a competition included in the Order of Merit

Select the competition from the list (so that it is highlighted) and either

---

1. Press the number of the Plan required (keys 1 to 8), or

2. Use the + (Plus) or - (Minus) keys to increase or decrease the plan number shown.

To remove all of the competitions from the current Order of Merit

Click Clear All.

To award additional points to a Player

1. Select the **Other Points** tab

2. Click **Add** button

3. Chose a player from the list and click **OK**

4. In the **Points** box, enter the number of points to award the player

5. In the **Description** box, enter a description of the reason for the additional points

6. Click **OK**.

To change additional points already allocated to a player

1. Select the **Other Points** tab

2. Do one of the following

   - Highlight the entry in the list with a single click and click **Edit** button, or

   - Double-click the entry in the list

3. In the **Points** box, enter the number of points to award the player

4. In the **Description** box, enter a description of the reason for the additional points

5. Click **OK**.

To remove additional points already allocated to a player

1. Select the **Other Points** tab

2. Highlight the entry in the list with a single click and do one of the following

   - Click **Remove** button, or

   - Press the DELETE key on the keyboard

To remove all additional points allocated

1. Select the **Other Points** tab.

2. Click **Remove All** button.

Notes:

Any additional points awarded to players will be added to the players' points total without affecting the number of competitions counting for that player. As a result, additional points are outside of any "Best Scores" limit placed upon them.

13.17.1.7 Change format of an Order of Merit Competition

To change the format of an Order of Merit competition already created

1. Do one of the following:

    - On the **Reports** menu, click **Competition Reports,** then **Order of Merit**

    - On the Task/Explorer tab, click **Explorer** and then **Order of Merit Competitions**.

2. Highlight the Order of Merit competition to be changed.

3. Do one of the following:

    - Click **Amend Order of Merit Format** in the Order of Merit Tasks

    - Right-click the chosen Order of Merit Competition and select **Amend Order of Merit Format**.

13.17.1.8 Edit Order of Merit Competition Notes

To edit the notes of an Order Of Merit competition

1. Do one of the following:

    - On the **Reports** menu, click **Competition Reports,** then **Order of Merit**

    - On the Task/Explorer tab, click **Explorer** and then **Order of Merit Competitions**.

2. Highlight the Order of Merit competition to be changed.

3. Right-click the chosen Order of Merit Competition and select **Edit Notes**.

4. Edit the notes and click **OK** to save them.

See Also

- Creating an Order of Merit Competition

- Setting up an Order of Merit Plan

- Adding or Updating scores for an Order of Merit

- Changing the format of an existing Order of Merit

- Deleting an Order of Merit Competition

- Stop an Order of Merit showing on Master Scoreboard

13.17.1.9 Delete an Order of Merit Competition

To delete an Order of Merit competition

1. Do one of the following:

   - On the **Reports** menu, click **Competition Reports,** then **Order of Merit**

   - On the Task/Explorer tab, click **Explorer** and then **Order of Merit Competitions**.

2. Highlight the Order of Merit competition to be deleted.

3. Do one of the following:

   - Click **Delete an Order of Merit** in the Order of Merit Tasks

   - Right-click the chosen Order of Merit Competition and select **Delete Order of Merit**.

See Also

- Creating an Order of Merit Competition

- Setting up an Order of Merit Plan

- Adding or Updating scores for an Order of Merit

- Changing the format of an existing Order of Merit

- Edit Order of Merit Competition Notes

13.17.2 Eclectic Competitions

13.17.2.1 Introduction

Operating Eclectic Competitions

An Eclectic Competition is defined as being played under stroke-play conditions and is where competitors play two or more rounds, and the eclectic score is the players' choice score of each hole in all of the rounds.

This chapter describes the process of running Eclectic Competitions.

Contents

- Overview of Eclectics

- Creating an Eclectic competition

- Adding or updating scores used in an Eclectic

- Changing the format of an existing Eclectic

- Deleting an existing Eclectic

- Edit Eclectic Competition Notes

- Convert General Play score to Eclectic score

- Stop an Eclectic showing on Master Scoreboard

- Matching Scorecards ("Countback") to resolve a Tie

13.17.2.2 Eclectic Competitions

Overview of running an Eclectic competition in HandicapMaster

The typical stages of running an eclectic competition are

1.   Create the eclectic competition in HandicapMaster.

2.   Run one or more stroke-play competitions or ask players to return casual cards for the purpose of the eclectic

3.   Update the eclectic with the competition scores or the casual cards.

4.   Reprint the eclectic results.

The features of Eclectic competitions supported by HandicapMaster

The following features are available when creating an Eclectic competition in HandicapMaster:

Type of 'best score'

A player's eclectic score is their best score of each hole in all of the rounds. HandicapMaster supports two choices for "best score"; either

- Fewest strokes taken on the hole, or

- Most Stableford Points won on the hole.

Players entering the Eclectic before the competition starts

If the eclectic competition is one where players can choose whether to enter before the eclectic starts, you may pre-selected those players who enter in advance. This allows for quick addition of scores from stroke-play competitions to be added to the eclectic analysis, simply by adding the stroke-play competitions to the eclectic. In this situation, HandicapMaster will automatically only include scores from those players pre-selected.

How the scores for the Eclectic are to be entered

There are two ways to enter a player's score into an eclectic:

- The player's score could already be entered as part of a stroke-play competition (that has been closed), or

- The player's score could be entered especially for the eclectic. These type of scores are called "Casual Cards" in HandicapMaster.

It is also possible to mix competition scores and casual cards in the same eclectic.

Handicap Allowance

Where the eclectic results are based on the fewest strokes taken on each hole by each player, you may allocate a handicap allowance for each player. This allowance is applied to the handicap of the player at the time the results of the eclectic are generated, or from a chosen date.

Where the handicap of the player is the handicap at the time the results are generated, then effectively this uses the handicaps of players as at the end of the eclectic. This matches the historic recommendation of the Ladies Golf Union in their Ladies Handicap system, prior to ladies handicapping being merged with the CONGU handicapping system in 2004, and subsequently replaced by the World Handicap System.

See Also

- Creating an Eclectic competition

- Adding or updating scores used in an Eclectic

- Changing the format of an existing Eclectic

- Deleting an existing Eclectic

- Edit Eclectic Competition Notes

- Convert General Play score to Eclectic score

- Stop an Eclectic showing on Master Scoreboard

- Matching Scorecards ("Countback") to resolve a Tie

13.17.2.3 Creating an Eclectic Competition

An Eclectic Competition is defined as being played under stroke-play conditions and is where competitors play two or more rounds, and the eclectic score is the players' choice score of each hole across all of the rounds.

HandicapMaster uses hole-by-hole scores to calculate an Eclectic result.

The following is supported for Eclectic results:

- A choice of fewest strokes taken per hole or most Stableford points scored on each hole.

- Rounds can be any combinations of 9 to 18 holes,

- Scores returned in singles Stroke-play competitions may be used as the basis of the Eclectic results, and/or scorecards returned especially for the Eclectic competition may be recorded.

To start an Eclectic Competition Report

1. Do one of the following:

- On the **Competitions** menu, click **Eclectics**

- On the Task/Explorer tab, click **Explorer** and then **Eclectics**

2.   Select the **Create a New Eclectic** task, or press the INSERT key on the keyboard.

3.   Create the Eclectic competition using the Eclectic Competition Wizard.

See Also

- Overview of Eclectics

- Adding or updating scores used in an Eclectic

- Changing the format of an existing Eclectic

- Deleting an existing Eclectic

- Edit Eclectic Competition Notes

- Convert General Play score to Eclectic score

- Stop an Eclectic showing on Master Scoreboard

- Matching Scorecards ("Countback") to resolve a Tie

13.17.2.4 The Eclectic Competition Wizard

The Eclectic Competition Wizard steps through the stages of starting or amending a competition.

Name and Nature of Eclectic Competition

1.   In the **Name** box, enter a title for this Eclectic.

2.   In the **Description** box, enter a description for this Eclectic. The description will be displayed on the Eclectic Competitions list.

3.   In the **Type of Eclectic Scores** section, chose one of

- **Fewest Strokes on each Hole**. This is a traditional eclectic using the player's best gross score on each hole towards their Eclectic result.

- **Most Stableford Points on each hole**. This is an amalgamation of the most number of points won on each hole.

4.   Click **Next >**.

How Players have entered this Competition

5.   If players have been asked to sign-up for the Eclectic in advance of any stroke-play competitions being played or casual cards being returned, tick the **Players have signed up in Advance** box.

6.   You may restrict who is eligible to be included in the Eclectic.

- Tick the **Men** box if gentlemen are to be included.

- Tick the **Ladies** box if ladies are to be included.

- Tick the **Include Visitors** box if non-members are to be included.

In the 'Other restrictions on entry' section,

- Tick **Only players in selected age groups** box if some players in selected age groups are

not eligible to enter. Only players who are in one of the selected Age Groups (as defined in their Membership Record) will be allowed to be entered into the Competition. Two of the Age Groups provided may be renamed using Options.

- Tick **Only members in selected membership categories** box if some players in selected membership categories are not eligible to enter. Select which of the membership categories are eligible to enter.

- Tick **Only players with a Handicap within a selected range** box if there is a restriction on who may enter based upon the player's handicap (e.g. "Only players with a handicap of 18 or over may enter"). Enter the range of handicaps allowed to enter in the **Handicaps from / to** boxes.

   Note: When checking if a player is eligible to enter the competition, the player's current handicap held on the system will be checked (which could differ from the handicap held by the player at the date of the competition).

7.   Click **Next >**.

8.   If "Players have signed up in Advance" is selected, identify which players have entered by ticking the box alongside their names. Then click **OK**. To quickly locate a player in the list, just type the first letters of the player's Surname.

Notes:

- At least one of Men/Ladies boxes must be selected.

How scores will be collected

9.   Choose whether scores from stroke-play competitions or cards returned especially for the Eclectic ("Casual Cards") (or a mixture of the both) are to be used as the basis of the Eclectic competition.

10.   Click **Next >**.

Scorecards from Stroke-Play Competitions

If scores are collected from stroke-play competitions and players have not been selected in advance, you may choose whether to include all scorecards from competitions or selected scorecards only.

11.   Select either

- **Add All Scorecards** to use the scores of all the players in the competition

- **Add Selected Scorecards Only** to choose which competition scores are used.
  Scorecards are selected for each competition at the time that the competition is included in the Eclectic.

12.   Click **Next >**.

Casual Cards

If scores are to be collected for the Eclectic from 'casual cards', then identify the golf course and tees to be used by players when returning casual cards.

13.   In the **Holes Played** box, choose whether the casual cards will be scores played over eighteen holes, or the front or back nine holes only.

14.   In the **Rounds will be played over the Course** box, choose the golf course to be used by players when returning casual cards..

15.   In the **Competitors play from these Tee Markers** box, choose which tees players will have the

option of playing from, when returning casual cards.

16.   Tick the **Casual cards will count for Handicap purposes** box if you wish the Casual Card scores to count for handicapping in player's records.

17.   Click **Next >**.

If the eclectic is to be based on players gross scores (not Stableford points) on each hole, then choose any Handicap allowance the player's will receive. This Handicap allowance will use the players current Handicap at the time the results are published (effectively their Handicap at the end of the Eclectic). See Matching Scorecards ('Countback') to resolve a tie for details of how a tie is resolved.

18.   Choose a Handicap Allowance for the Eclectic.

19.   If you select an allowance other than **None** , choose the date to be used for Handicap of the players in the **Allowance and Divisions (if applicable) b**a**sed upon Handicap as at** section.

   - To allocate Handicap allowances based upon player's current Handicap (in effect the Handicap at the end of the eclectic), select **Date when results calculated**.

   - If you prefer to set a specific date and use the Handicap players held on this date, select **Date of** and enter the date. In the event that a player's handicap record does not start until after the selected date, the first Handicap they held after this date will be used instead.

   If you choose to present results by divisions the player's Handicap based on the date option selected will be used to calculate the division each player should be included within.

   If you select an allowance of **None** you can then choose the date to be used for the Handicap of the players when presenting results in divisions, in the **Divisions (if applicable) based upon Handicap as at** section. The date option selected will be used for the player's Handicap and determine the division each player should be included within .

20.   Tick the **Handicap Allowance to one Decimal Place** box if you wish the net scores for players to be based upon their Handicap allowance being calculated to one decimal place.

21.   Click **Next >**.

22.   Tick the **Include on MasterScoreboard.co.uk** box if you wish this Eclectic to be included when running the publish to Master Scoreboard wizard, so the results will be displayed on the Master Scoreboard web site.

23.   Tick the **Show results in Divisions** box if you wish players to be split into categories based on their handicap at the time the Eclectic results are created.

   a. Identify how many divisions (2 to 4) you would like the field split into. Enter this number in the **Number of Divisions** box.

   b. Identify the maximum Handicap for all but the last of the divisions, in the applicable **Upper Handicap** boxes.

   c. Tick the **New Page for each Division in Report** box if you would like each division to be reported on its own page in the report.

24.   Tick the **Include Countback Scores (display scores in small font)** box to include 'countback' scores on the report. Un-tick this option to prevent the countback details being displayed and for the results to be displayed in a larger font size.

   Note: Where competitions of less than 9 holes make up an eclectic some of the countback

columns may not be applicable and may contain - (dash).

25. Tick the **Include list of competitions** box to show details of the competitions included in the Eclectic as part of the results report. You may also print this as a separate report.

26. Tick the **Include number of rounds for each Player** box to add a "(Rounds)" column to the results report. This column will detail the number of competition rounds, plus casual cards, counting for each player towards their Eclectic result.

27. Click **Next >**.

Notes

28. Enter any notes that you wish to append to the end of the report in the **Notes (displayed on Report)** box.

29. Click **Next >**.

30. Click **Finish** to create or update the Eclectic.

See Also

- [Overview of Eclectics](#)
- [Adding or updating scores used in an Eclectic](#)
- [Changing the format of an existing Eclectic](#)
- [Deleting an existing Eclectic](#)
- [Edit Eclectic Competition Notes](#)
- [Convert General Play score to Eclectic score](#)
- [Stop an Eclectic showing on Master Scoreboard](#)
- [Matching Scorecards ("Countback") to resolve a Tie](#)

13.17.2.5 Adding or updating scores to an Eclectic

You must add scores to the Eclectic, so they are included in the analysis. These scores may be from

- Stroke-play Competitions, or
- 'Casual Cards'

Whether you are able to add scores from stroke-play competitions and/or casual cards will depend upon how the Eclectic competition was configured when it was created. See [The Eclectic Competition Wizard](#).

To add (or update) scores to an Eclectic

1. Do one of the following:
   - On the **Competitions** menu, click **Eclectics**
   - On the [Task/Explorer tab](#), click **Explorer** and then **Eclectics**

2. Do one of the following:
   - Double-click the chosen Eclectic Competition

- Highlight the chosen Eclectic Competition and click **Update an Eclectic** in the Eclectic Tasks

- Right-click the chosen Eclectic Competition and select **Update an Eclectic**.

3.   The Update Eclectic Scores window is displayed. Use this window to add or update scores included in the Eclectic.

See Also

- Overview of Eclectics

- Creating an Eclectic competition

- Changing the format of an existing Eclectic

- Deleting an existing Eclectic

- Edit Eclectic Competition Notes

- Convert General Play score to Eclectic score

- Stop an Eclectic showing on Master Scoreboard

- Matching Scorecards ("Countback") to resolve a Tie

13.17.2.6 The Update Eclectic Scores window

The Update Eclectic Scores window defines which scores are included in an Eclectic analysis.

Tip:

The size of this window may be increased by dragging the edges of the window to form a larger window.

The window will display either one or two tabs, depending on the configuration of the Eclectic.

To include scores from a stroke-play competition in an Eclectic report

1.   Click the **Scores from Competitions** tab.

If using scores from stroke-play competitions has not been configured for the eclectic, click the **Amend Eclectic Format** button to reconfigure the eclectic using the Eclectic Competition Wizard to allow stroke-play competition scores.

2.   Tick the boxes alongside all competitions where scores should be included in the Eclectic.

3.   Click **OK**.

Note:

If the option "When adding Scores from Stroke-play competitions... Add Selected Cards Only" was chosen when creating the Eclectic competition, then as you tick a competition to be added to the Eclectic, HandicapMaster will display a list of the entrants for that competition. Tick the boxes alongside those players whose scores are to be included in the Eclectic and then click **OK**. To quickly locate a player in the list, just type the first letters of the player's Surname.

To include a casual card in an Eclectic report

1.   Click the **Casual Scorecards** tab.

If using casual scorecards has not been configured for the eclectic, click the **Amend Eclectic**

Format button and reconfigure the eclectic using the [Eclectic Competition Wizard](#) to allow Casual Cards.

2.   In the **Date Round Played** box, select the date when the casual card was played.

3.   Click the **Add Casual Card** button.

Notes:

• To view or edit a card previously entered, highlight the player in the list of cards added and click the **Edit** button.

• To remove a card previously entered, highlight the player in the list of cards added and click the **Remove** button.

• You may [convert previously-entered General Play scores](#) to become Casual Cards in an Eclectic instead.

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See Also

</div>

• [Overview of Eclectics](#)

• [Creating an Eclectic competition](#)

• [Changing the format of an existing Eclectic](#)

• [Deleting an existing Eclectic](#)

• [Edit Eclectic Competition Notes](#)

• [Convert General Play score to Eclectic score](#)

• [Stop an Eclectic showing on Master Scoreboard](#)

• [Matching Scorecards ("Countback") to resolve a Tie](#)

13.17.2.7 Change format of an Eclectic Competition

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To change the format of an Eclectic competition already created

</div>

1.   Do one of the following:

   • On the **Competitions** menu, click **Eclectics**

   • On the [Task/Explorer tab](#), click **Explorer** and then **Eclectics**

2.   Highlight the Eclectic competition to be changed.

3.   Do one of the following:

   • Click **Amend Eclectic Format** in the Eclectic Tasks

   • Right-click the chosen Eclectic Competition and select **Amend Eclectic Format**.

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See Also

</div>

• [Overview of Eclectics](#)

• [Creating an Eclectic competition](#)

• [Adding or updating scores used in an Eclectic](#)

- Deleting an existing Eclectic

- Edit Eclectic Competition Notes

- Convert General Play score to Eclectic score

- Stop an Eclectic showing on Master Scoreboard

- Matching Scorecards ("Countback") to resolve a Tie

13.17.2.8 Delete an Eclectic Competition

To delete an Eclectic competition

1. Do one of the following:

    - On the **Competitions** menu, click **Eclectics**

    - On the Task/Explorer tab, click **Explorer** and then **Eclectics**.

2. Highlight the Eclectic competition to be deleted.

3. Do one of the following:

    - Click **Delete an Eclectic** in the Eclectic Tasks

    - Right-click the chosen Eclectic Competition and select **Delete Eclectic**.

    - Press the DELETE key on the keyboard.

See Also

- Overview of Eclectics

- Creating an Eclectic competition

- Adding or updating scores used in an Eclectic

- Changing the format of an existing Eclectic

- Edit Eclectic Competition Notes

- Convert General Play score to Eclectic score

- Stop an Eclectic showing on Master Scoreboard

- Matching Scorecards ("Countback") to resolve a Tie

13.17.2.9 Edit Eclectic Competition Notes

To edit the notes of an Eclectic competition

1. Do one of the following:

    - On the **Competitions** menu, click **Eclectics**

    - On the Task/Explorer tab, click **Explorer** and then **Eclectics**

2. Highlight the Eclectic competition to be changed.

3.   Right-click the chosen Eclectic Competition and select **Edit Notes**.

4.   Edit the notes and click **OK** to save them.

13.17.2.1 Convert General Play score to Eclectic score

You may convert a score entered as a General Play score into an Eclectic Casual Card.

To convert a score entered as a General Play score into an Eclectic Casual Card

1. In the **Handicapping** place, select **General Play Scores (Completed)**.

2. Highlight a score to be converted and click with the right-hand mouse button over this entry in the list.

3. In the pop-up menu, select **Convert Score to Eclectic Casual Card**.

4. Select the applicable Eclectic competition from the list and click **OK**.

Notes:

- The chosen Eclectic competition must be configured to allow Casual Cards to be added to the Eclectic.

13.17.2.1 Disqualified Scores and Eclectics

Where a player's score is marked as Disqualified from a competition, their hole-by-hole scores for that competition will *not* be included in any Eclectic calculations.

The exception to this is if the disqualification is for a breach of rule of golf 3-2 ("failure to hole out"). Where a player scores a "No Return" for the competition, then their hole-by-hole scores *will* be included in the analysis. For the scores to be included in the Eclectic analysis in this situation, the *reason for disqualification* must be identified as breach of rule 3-2.

See Also

- Overview of Eclectics

- Creating an Eclectic competition

- Adding or updating scores used in an Eclectic

- Changing the format of an existing Eclectic

- Deleting an existing Eclectic

- Edit Eclectic Competition Notes

- Convert General Play score to Eclectic score

- Stop an Eclectic showing on Master Scoreboard

- Matching Scorecards ("Countback") to resolve a Tie

13.17.2.12 Matching Scorecards ("Countback") to resolve a Tie - Eclectics

Where the results in an eclectic competition result in a tie, card matching (*Countback*) is used to split ties.

The method is ..

- The winner is determined based on the score for the last nine holes, last six holes, last three holes and finally the last hole in turn.

- If there is still a tie, and the Eclectic is covering scores played over 18-holes, the winner is then determined based on the score for the last six holes on the front nine (holes 4 to 9), last three holes on the front nine (holes 7 to 9) and finally the 9th hole, in turn.

- If there is still a tie, then players are ordered in alphabetic order.

If the eclectic is based on players gross scores (not Stableford points) on each hole, then any Handicap allowance you have chosen for the player's to receive is deducted from their best scores totals.

To view the scores used for card matching

1. Do one of the following:

   - On the **Competitions** menu, click **Eclectics**

   - On the Task/Explorer tab, click **Explorer** and then **Eclectics**

2. Select the required Eclectic competition in the list.

3. Do one of the following:

- Select the **Countback Scores** Task in the left-hand column, or

- Right-click over the competition and select **Countback Scores** in the pop-up menu.

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See Also

</div>

- [Overview of Eclectics](#)

- [Creating an Eclectic competition](#)

- [Adding or updating scores used in an Eclectic](#)

- [Changing the format of an existing Eclectic](#)

- [Deleting an existing Eclectic](#)

- [Convert General Play score to Eclectic score](#)

- [Edit Eclectic Competition Notes](#)

- [Stop an Eclectic showing on Master Scoreboard](#)

13.18 Suspending Players from Competitions

The *Suspending Players from Competitions* facility is available in the Gold of HandicapMaster

In some circumstances, it may be desirable to suspend players from having the right to compete in competitions. This is often seen as a less severe punishment for breaches of responsibility by the player than suspending their handicap.

To suspend a player from competitions

1.   On the **Competitions** menu, click **Suspend Player from Competitions...** and select a Member from the list displayed.

2.   Enter a date for the last day of suspension for the player.

The player will be displayed as "Banned" in the All Members list and will not be available for entering competitions.

To remove the suspension of a player from competitions

1.   On the **Competitions** menu, click **Suspend Player from Competitions...** and select the Member from the list displayed.

If the player already has a suspension in place, you will be offered the option to cancel the suspension.

Alternatively, the suspension will be cancelled automatically once the suspension date has passed.

Note: In the situation where you would like to cancel a suspension that has already passed its end date (for example, to enter a scorecard into a past competition), suspend the player from competitions once again (using a future date), then cancel this new suspension. This will clear all previous suspension records.

To print a list of Players who are currently suspended from Competitions

Do one of the following:

1.   On the **Reports** menu, select **Competition Reports** and click **Players suspended from Competitions**, or

2.   In the Reports List, click **Competitions** tab, then double-click **Players suspended from Competitions**.

Notes:

- The option to suspend players from competitions is available in the Gold of HandicapMaster.

13.19 Managing Competition Entry Fees

13.19.1 Introduction

It is possible to set entry fees for competitions and have these fees recorded by HandicapMaster.

These records may then be viewed and either:

- Processed immediately by the <u>Subscriptions Option</u> by use of a <u>competition fee 'purse'</u>

- Processed by the <u>Subscriptions Option</u> when a <u>competition is closed</u>. This system is deprecated and we recommend the use of the <u>competition fee 'purse'</u> facility.

- Processed by an <u>external accounting/ or till</u> system.

The "immediate" competition fee processing option is the recommended competition entry fee option that customers with the <u>Subscriptions Option</u> should utilise as this allows for separate purses for subscriptions and competition fees.

Notes:

The **Competition Fees** option is only available in the Gold editions of HandicapMaster.

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

Contents

- <u>Set a fee structure for a competition</u>

- <u>The Manage Competition Fees window</u>

- <u>Prevent entry to competition if insufficient funds in member's account</u>

- <u>Process fees immediately using a Competition fee Purse</u>

- <u>Process Competition fees when a competition is closed</u>

13.19.2 Set a Fee Structure for a Competition

To Set a Fee Structure and record Competition Fees

1.   On the left hand task pane, select **Competitions** place. On the right hand pane, double-click **Templates**. Select a Template and press ENTER Key.

2.   Modify the template Information using the <u>Competition Template Wizard</u> provided.

Once a competition has been opened, use the **Fees** tab of the Configure Competition window to view the Fee settings.

Note:

The **Competition Fees** option is only available in the Gold editions of HandicapMaster.

13.19.3 View and process Fees

To view and process Fees to be collected

1. On the **Competitions** menu, select **Manage Competition Fees**.

2. Process the fees through the Manage Competition Fees window.

Note:

The **Competition Fees** option is only available in the Gold editions of HandicapMaster.

13.19.4 The Manage Competition Fees window

Manage Competition Fees

The Manage Competition Fees window allows you to view unprocessed Fees and, once processed, mark all fees as processed.

You may choose one of four options available:

- **View Unprocessed Fees payable**

  Select this option to view (or export to CSV File) all outstanding competition fees that have not been marked as processed.

- **View Unprocessed Fees due for Refund**

  Select this option to view (or export to CSV File) all outstanding competition fees that are due to be refunded and have not been marked as processed.

  Fees due to refunded are those fees from competitions where the fee records have previously been marked as processed, but where the competition was subsequently undone.

- **Either**

  - Mark all Fees as processed

    Select this option when using an external accounting system to flag all fee records (Payable and refundable) as having been processed. These records will no longer appear on reports.

  - Process Fees and Refunds (Refunds will be marked as 'void')

    Select this option when using Subscriptions Option to flag all fee records (Payable and refundable) as having been processed. These records will no longer appear on reports. The invoices raised or refunds (marked as 'void') will be available within the Subscriptions Option.

- **View Summary of fees for closed competitions**

  Select this option to view a summary of the fees relating to a selection of closed competitions. The summary shows the total fees accrued for each category of fee, both as a summary for each competition in a selected time period and also across all competitions in the time period.

- **Reconcile payments made through <name> system by competition**

  If you have an interface to an external system which is used to record competition fee payments, select this option to view a summary of the fees paid through the external system (for a selected competition). This option is only available where an external 'callback' has been configured into one or more Player Entry profiles.

Notes

- The **Competition Fees** option is only available in the Gold editions of HandicapMaster.

- Competition Fee records are retained in the system for six months after the competition was Applied. However, the Summary report may be run against closed competitions from any date in the system. (See Note below for "no show" player fees.)

- You may choose to pre-set the folder where export files are created using Global Options. When set, Export files will be named "Comp_Fees_Sales_yyyy_mm_dd_nn.csv" or "Comp_Fees_Refunds_yyyy_mm_dd_nn.csv" depending whether unprocessed fees payable or unprocessed refunds are being exported (where *yyyy_mm_dd* is the date the file is created and *nn* a sequence number from 01 upwards for that day).

NOTE

When using the Subscriptions Option with the raising of fees when the competition is closed and where Entry fee for "no show" players have been recorded these will no longer be included on the summary report after 6 months. The invoices raised for these players will remain in the player's transaction history. Note that if a separate purse for competition fees is being used this paragraph does not apply.

When using the Subscriptions Option with separate purse for competition fees then only the **View Summary of fees for closed competitions** is available.

13.19.5 Process fees immediately using a Competition fee Purse

Introduction

By using a separate competition fee 'purse' competition fee entry deduction can be processed "immediately" by the Subscriptions Option.

This has the advantage that where multiple rounds of a competition are being played on the one day the members competition fee purse balance is deducted when the sign in to the first round rather than when the competition is closed. This allows for the situation where a player has entered round 1 of a competition in the morning but then has insufficient funds for the 2nd round and so will be denied entry until their competition fee purse is "topped up"

To use a separate Competition fee purse you must enable the Competition Fee Purse.

You will also need to configure Player Entry to Prevent entry to competition if insufficient funds in member's account

A number of reports are available to allow for the management of competition fee purses

Contents

- Enable Competition fee purse

- Manage Competition Fee Purses

- Top up Competition fee purse

- Prevent entry to competition if insufficient funds in member's purse

13.19.5.1 Enable Competition Purse

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

To Enable the separate Competition Purse

1. On the **Accounting** menu click **Configure** and then click **Competition Purse**.

2. Tick the box **Separate Purse for Competitions**

3. Select a period to **Retain records of transactions for:** the default is 1 year

4. Click **OK**

To Automatically E-mail or Print Competition Purse Receipts

1. On the **Accounting** menu click **Configure** and then click **Competition Purse**.
   The **Separate Purse for Competitions** option must be ticked.

2. Tick the box **Automatically E-mail or Print Receipts** if you wish a receipt to be sent to a member when a Top Up is applied to a member's purse.

   - If you enable the automatic E-mail or Print of receipts the receipt will be sent by e-mail or printed depending on the option selected for the member. Further details on setting this are available within the E-mailing Subscriptions section.

3. To use a specific printer for the printing of any receipts tick **Default Printer** and select the appropriate printer.

4. Click OK.

To Allow refund of purse transactions balance adjustments and reporting for Past (resigned) Members

By default it is not possible to issue a refund of a competition purse transaction, make a balance adjustment for a Past (resigned) member or produce purse reports for Past (resigned) members If your organisation permits such refunds, balance adjustments tor reporting hen the following option may be used to allow these refunds balance adjustments and reporting in HandicapMaster.

1. On the **Accounting** menu click **Configure** and then click **Competition Purse**.
   The **Separate Purse for Competitions** option must be ticked.

2. Tick the box **Allow Refunds, Balance Adjustments and Purse Reports for Past Members**

3. Click **OK**

Set a minimum that Members must pay when topping up their competition purse online

Where you have configured the system to take payments online through Stripe, you may set a minimum that members must spend when topping up their competition purse online.

1. On the **Accounting** menu click **Configure** and then click **Competition Purse**.
   The **Separate Purse for Competitions** option must be ticked and the system must be configured to accept payments through Stripe.

2. Enter the minimum amount in the **Minimum online Top-up is** box.

3. Click **OK**

Notes

Enabling a separate Competition purse will automatically enable some extra features in HandicapMaster.

- A number of <u>Purse related reports</u> will offer the option to choose between the **Subscriptions** and **Competition Purse**

    These are

        Member Purse Account Statement

        Member Purse Transaction History

        Purse Balance (Summary)

        Purse Balance (Summary) - With Limit

- Additional list of information is made available in the <u>Member's Purses</u> list.

13.19.5.2 E-Mail or Print Competition Purse Receipt

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

1. Do one of the following:

    - On the left hand task pane, select **Accounting** place, on the right hand side double click on **All Competition Purse Transactions** or **Competition Purse Transactions in Current Year** to view a list of competition purse transactions. then click to highlight a fee from the list and then right click and select **Print Receipt** or **E-Mail Receipt** or

    - On the **Accounting** menu, select **Purses** and select **Print Competition Purse Receipt** or **E-mail Competition Purse Receipt** as appropriate, then select a Competition purse transaction from the list displayed.

13.19.5.3 Manage Competition Purses

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

To help manage Competition fees a number of reports have been enhanced.

In addition there is a Member's Purse List that may be viewed

View List of Member's Purses

1. Do one of the following:

    - On the **Accounting** menu, select **Purses** and select **Member's Purses**

    - On the <u>Task/Explorer tab</u>, click **Explorer** and then **Member Purses**.

View list of Competition Fee Transactions

On the Left Hand Task Pane, select **Accounting** place, then click on the **All Competition Fees** or **Competition Fees in Current Year** to view a list of competition fees.

There is also a report of competition purse transactions.

1.	Do one of the following:

- On the **Reporting** menu, select **Accounting Reports** and select **Member Purse Transactions**

- On the Task/Explorer tab, click **Tasks** and then in the **Places** list in the left-hand column, click **Reports**

- On the right hand side double click on **Member Purse Transactions**

2. Select the gender and age group to be included in the report

3. You can limit the report to a single membership category if required

4. Select a date range and click OK.

Member Purse Account Statement

You may view a member's account statement for a specific time period and for a specific purse.

1.	Do one of the following:

- On the **Reporting** menu, select **Accounting Reports** and select **Member Purse Account Statement**

- On the Task/Explorer tab, click **Tasks** and then in the **Places** list in the left-hand column, click **Reports**

- On the right hand side select the **Accounting** Tab

- Double click on **Member Purse Account Statement**

5. Select the member to be included in the report and click OK

6. Select a date range

7. Select the Purse to be reported and click OK.

Member Purse Transaction History

You may view a one or more member's purse transaction History for a specific time period and for a specific purse.

1.	Do one of the following:

- On the **Reporting** menu, select **Accounting Reports** and select **Member Purse Transaction History**

- On the Task/Explorer tab, click **Tasks** and then in the **Places** list in the left-hand column, click **Reports**

- On the right hand side double click on **Member Purse Transaction History**

2. Select the members to be included in the report and click OK

3. Select a date range

4. Select the Purse to be reported and click OK.

As well as various reports the competition fee data may be exported to a CSV file.

13.19.5.4 Top up Competition Purse

> Subscriptions, Invoices and Payments are only available when the Subscriptions Option
> has been installed as a registered option. If these are not available, then the Subscriptions
> Option may not be installed.

Record top-up in HandicapMaster

1. Do one of the following:

   - On the left hand task pane, select **Accounting** place, on the right hand side double click on
     Member Purses then click to highlight a member from the list and then right click and select
     Adjust Balance or

   - On the **Accounting** menu, select **Purses** and select **Adjust Purse Balance** then tick the box
     alongside one or more members in the list displayed. Click **OK**. If you select more than one
     member, the same adjustment will be applied to each selected member's purse.

2. Select the type of purse that is to be adjusted.

3. If you are recording a competition fee adjustment and the adjustment is a prize then tick the box
   Record as Prize. Click **Identify Competition** to add a note with details of the competition for which
   the prize was award.

4. Enter the adjustment in the **Adjust Balance by** or **Adjust balances of chosen Members each by** box
   and enter the gross value of the balance adjustment.

5. Enter a note if required, this is optional

6. Click **OK**

Online top up

If you have a Stripe account you can through Master Scoreboard offer online top up of the Competition
purse where members top up using a credit or debit card.

Please login to your Master Scoreboard Control Panel.

https://www.masterscoreboard.co.uk/Control-Panel

Click on "Manage Display of Information" and then at the bottom set " Show Competition Fee Purse
Balance:" to Yes

This will also enable the online top up provided you have published to Master Scoreboard since
enabling the purse.

Notes

- When adjusting a subscription balance if the VAT rate is non zero then the VAT amount will be
  calculated from the gross value entered.

- If the option Automatically E-mail or Print Receipts is selected then a receipt will be generated
  automatically.

- When the Record as Prize it selected the Notes section is auto filled with the word **Prize** as a default.

13.19.5.5 Prevent entry to competition if insufficient funds in member's purse

Introduction

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

When combined with the Subscriptions Option it is possible to configure Player Entry to check a member's competition purse balance, and prevent entry to the competition if the member has insufficient funds when signing-in or when booking in using Player Entry.

When a player either sign's in or books into to a competition using the HandicapMaster Player Entry screens, the member's competition purse balance is accessed to check the account has sufficient funds to enter the competition. If the competition purse has sufficient funds, then the player is signed in or booked in to the competition.

A member's competition fee purse is deemed as having sufficient funds if the Competition Fee is less than or equal to the current Balance plus Overdraft Limit.

NOTE: Sign in of a player from within HandicapMaster does NOT deduct a competition fee.

Configuration when a player Signs in

The following entries should be configured through the Player Entry Settings for the settings profile being used for sign-in.

Key	Details	Default Value
ServiceID	Identifies the facility(s) to be activated. Use value 72 for this to prevent entry to competition if insufficient funds in Account facility when signing in	
Overdraft	An overdraft limit, allowing players to go overdrawn by up to this amount. Specified as a decimal amount, such as "5.00" for 5 pounds.	0.00
ReportAllCallbacks	True or False. Indicates whether balance checks where players have sufficient funds are included in the 'Callback Log' report.	False

StopIfCallbackFails1	True or False. Indicates whether the current processing in HandicapMaster should be allowed to continue if: • a player fails the balance check on their purse (Singles competitions) • one or more team members fails the balance check on their purse. (team competitions) Use **StopIfCallbackFails1=True** to prevent players signing in if any player (single or team competitions) fails their balance check.	False (processing continues even if members have insufficient funds)
AllowPaymentWithoutFunds	True or False. Indicates whether the player is to be permitted entry, even when the player has insufficient funds to cover the fee (I.e. OK to go overdrawn without authorisation).	False

To configure these settings, do the following:

1. In HandicapMaster, select COMPETITIONS place in the left hand pane.

2. Double-click SETTINGS PROFILES in the right-hand pane.

3. Double-click the applicable settings or click CREATE A NEW PROFILE template to start a new profile.

4. On the "Options" page, tick USE CALLBACK TO EXTERNAL SYSTEM AS PLAYERS BOOK/SIGN-IN box.

5. On the "Link to External System" page, select CALLBACK 72 in the USE CALLBACK list.

6. Click CONFIGURE CALLBACK SETTINGS button and enter the applicable values. Complete the wizard.

Configuration when a player Books in

The following entries should be configured through the Player Entry Settings for the settings profile being used for booking in.

Key	Details	Default Value
ServiceID	Identifies the facility(s) to be activated.	

	Use value 73 for this to prevent entry to competition if insufficient funds in Account facility when booking in	
Overdraft	An overdraft limit, allowing players to go overdrawn by up to this amount. Specified as a decimal amount, such as "5.00" for 5 pounds.	0.00
ReportAllCallbacks	True or False. Indicates whether balance checks where players have sufficient funds are included in the 'Callback Log' report.	False
StopIfCallbackFails1	True or False. Indicates whether the current processing in HandicapMaster should be allowed to continue if: • a player fails the balance check on their purse (Singles competitions) • one or more team members fails the balance check on their purse. (team competitions) Use **StopIfCallbackFails1=True** to prevent players signing in if any player (single or team competitions) fails their balance check.	False (processing continues even if members have insufficient funds)
AllowPaymentWithoutFunds	True or False. Indicates whether the player is to be permitted entry, even when the player has insufficient funds to cover the fee (I.e. OK to go overdrawn without authorisation).	False

To configure these settings, do the following:

7.   In HandicapMaster, select COMPETITIONS place in the left hand pane.

8.   Double-click SETTINGS PROFILES in the right-hand pane.

9.   Double-click the applicable settings or click CREATE A NEW PROFILE template to start a new profile.

10. On the "Options" page, tick USE CALLBACK TO EXTERNAL SYSTEM AS PLAYERS BOOK/SIGN-IN box.

11. On the "Link to External System" page, select CALLBACK 73 in the USE CALLBACK list.

Click CONFIGURE CALLBACK SETTINGS button and enter the applicable values. Complete the wizard.

Notes:

The following should be noted about the Callback service:

- Errors will not be propagated back to the user and will not stop Sign-in from completing, unless the "StopIfCallbackFails1" is set to TRUE.

- When Visitors sign-in, no callback will be invoked. I.e. NO fees will be deducted.

- An account is deemed as having sufficient funds if the Competition Fee is less than or equal to the current Balance plus Overdraft Limit.

- If online booking is being used NO competition fees are deducted.

- If a player who signed in has their score card cancelled the competition fees may be refunded, a prompt is displayed to confirm if the refund should be actioned.

- Sign in of a player from within HandicapMaster does NOT deduct a competition fee.

- When deducting fees at booking time, if the competition is a team competition each member of the team must have sufficient funds to be able to be booked in. If any one member in a team has insufficient funds the whole team will be prevented from signing in.

13.19.6 Process Competition fees when a competition is closed

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Introduction

The Subscriptions Option offers 2 ways to process and manage competition fees. These are mutually exclusive.

The "immediate" competition fee processing option is the recommended competition entry fee option that customers with the Subscriptions Option should utilise as this allows for separate purses for subscriptions and competition fees.

This section describes the older fee processing option which raises invoices when a competition is closed.

This section is deprecated and is only retained for those customers still using the older fee processing.

How fees are recorded

When a competition is applied, a record is maintained of each player who has a score recorded, along with the fees and amounts payable. Fees are configured through the Competition Template.

These fees may be viewed and/or exported to a CSV format file using the Manage Competition Fees

window.

Once the fees have been processed (viewed and/or exported to the accounting system), then may be marked as processed. Once fees have been marked as processed, they no longer appear on the reports or export files.

When fees are processed (after the competition is closed) in conjunction with the Subscriptions Option Invoices will be raised for each fee for each member and the member's account balance will be reduced.

If you wish "instant" fee deduction please use the competition fee 'purse' fee deduction method.

Note: When using the Subscriptions Option and when a competition is applied and a start sheet is available for the competition and if there are players listed on a start sheet, but these did NOT sign in or enter a score then you will be offered the option to raise a "mandatory" Entry fee for these "no show" players.

If a competition is Undone (Refunds)

If a competition is undone, then any fee records that have not been marked as processed will subsequently be ignored.

If the fees for this competition have already been marked as processed, then these fee records for this competition will be flagged as "**refundable**".

Fees due for refunding may also be viewed and/or exported to a CSV format file using the Manage Competition Fees window.

If the competition is re-applied, new competition fee records are created.

In summary:

If a competition that has had its fee records processed is undone and re-applied, all previous fee records will appear on the "refundable" list. A new set of 'payable' fee records will be created.

Notes: When using the Subscriptions Option and where entry fees were raised for "no show" players these will not be refunded or listed under the refunds but will remain so that when the competition is reapplied these fees will be included.

When using the Subscriptions Option if you cancel the competition these "no show" player entry fees will be deleted and associated invoices will be voided.

"Optional" Fee Items

When setting up fees for a competition, up to five separate accountable items may be selected.

The first item is called "Entry Fee" and will be recorded for each player.

Second, third, fourth and fifth items may be added, each with its own description. These items may be marked as either "Mandatory" or "Optional". Mandatory items will be recorded for each player. *Optional items will only be recorded if the player selects the item as they sign-in to a competition through the Player Entry system.*

13.19.6.1 Prevent entry to competition if insufficient funds in member's account

Introduction

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions

Option may not be installed.

This section is deprecated and is only retained for those customers still using the older fee processing.

The Subscriptions Option offers 2 ways to process and manage competition fees. These are mutually exclusive.

The "immediate" competition fee processing option is the recommended competition entry fee option that customers with the Subscriptions Option should utilise as this allows for separate purses for subscriptions and competition fees.

This section describes the older fee processing option which raises invoices when a competition is closed.

When combined with the Subscriptions Option it is possible to configure Player Entry to check a member's account balance, and prevent entry to the competition if the member has insufficient funds when signing-in or when booking in using Player Entry.

When a player either sign's in or books into to a competition using the HandicapMaster Player Entry screens, the member's account balance is accessed to check the account has sufficient funds to enter the competition. If the account has sufficient funds, then the player is signed in or booked in to the competition. When the competition fees are processed after the competition is closed invoices will be raised for the fees.

An account is deemed as having sufficient funds if the Competition Fee is less than or equal to the current Balance plus Overdraft Limit.

Note that when a player books in using Player Entry, only mandatory fees are processed.

Configuration when a player Signs in

The following entries should be configured through the Player Entry Settings for the settings profile being used for sign-in.

This section is deprecated and is only retained for those customers still using the older fee processing.

Key	Details	Default Value
ServiceID	Identifies the facility(s) to be activated. Use value 57 for this to prevent entry to competition if insufficient funds in Account facility when signing in	
Overdraft	An overdraft limit, allowing players to go overdrawn by up to this amount. Specified as a decimal amount, such as "5.00" for 5 pounds.	0.00
ReportAllCallbacks	True or False. Indicates whether balance checks where players have	False

	sufficient funds are included in the 'Callback Log' report.	
StopIfCallbackFails1	True or False. Indicates whether the current processing in HandicapMaster should be allowed to continue if one ore more team members has insufficient funds. Use **StopIfCallbackFails1=True** to prevent players signing in if any members of the team has insufficient funds.	False (processing continues even if some team members have insufficient funds)
AllowPaymentWithoutFunds	True or False. Indicates whether the player is to be permitted entry, even when the player has insufficient funds to cover the fee (I.e. OK to go overdrawn without authorisation).	False

To configure these settings, do the following:

1. In HandicapMaster, select COMPETITIONS place in the left hand pane.

2. Double-click SETTINGS PROFILES in the right-hand pane.

3. Double-click the applicable settings or click CREATE A NEW PROFILE template to start a new profile.

4. On the "Options" page, tick USE CALLBACK TO EXTERNAL SYSTEM AS PLAYERS BOOK/SIGN-IN box.

5. On the "Link to External System" page, select CALLBACK 57 in the USE CALLBACK list.

6. Click CONFIGURE CALLBACK SETTINGS button and enter the applicable values. Complete the wizard.

Configuration when a player Books in

The following entries should be configured through the Player Entry Settings for the settings profile being used for booking in.

This section is deprecated and is only retained for those customers still using the older fee processing.

Key	Details	Default Value
ServiceID	Identifies the facility(s) to be activated. Use value 58 for this to prevent entry to competition if insufficient	

	funds in Account facility when booking in	
Overdraft	An overdraft limit, allowing players to go overdrawn by up to this amount. Specified as a decimal amount, such as "5.00" for 5 pounds.	0.00
`ReportAllCallbacks`	True or False. Indicates whether balance checks where players have sufficient funds are included in the 'Callback Log' report.	False
StopIfCallbackFails1	True or False. Indicates whether the current processing in HandicapMaster should be allowed to continue if one ore more team members has insufficient funds. Use **StopIfCallbackFails1=True** to prevent players booking in if any members of the team has insufficient funds.	False (processing continues even if some team members have insufficient funds)
AllowPaymentWithoutFunds	True or False. Indicates whether the player is to be permitted entry, even when the player has insufficient funds to cover the fee (I.e. OK to go overdrawn without authorisation).	False

To configure these settings, do the following:

7.   In HandicapMaster, select COMPETITIONS place in the left hand pane.

8.   Double-click SETTINGS PROFILES in the right-hand pane.

9.   Double-click the applicable settings or click CREATE A NEW PROFILE template to start a new profile.

10.   On the "Options" page, tick USE CALLBACK TO EXTERNAL SYSTEM AS PLAYERS BOOK/SIGN-IN box.

11.   On the "Link to External System" page, select CALLBACK 58 in the USE CALLBACK list.

Click CONFIGURE CALLBACK SETTINGS button and enter the applicable values. Complete the wizard.

Notes:

The following should be noted about the Sign-in Callback service:

▪ Errors will not be propagated back to the user and will not stop Sign-in from completing, unless the "StopIfCallbackFails1" is set to TRUE.

- When Visitors sign-in, no callback will be invoked.

- An account is deemed as having sufficient funds if the Competition Fee is less than or equal to the current Balance plus Overdraft Limit.

- If online booking is being used NO competition fees are deducted.

Chapter

14

Working with Match-Play Competitions

14   Working with Match-Play Competitions

14.1   Introduction

Entering and processing Match-play Competitions.

HandicapMaster can allow you to manage club 'Knock out' competitions and other Match Play competitions. You may prepare a Match Play competition, by producing a draw from a list of entrants (at random or in the order the entrants are chosen) and then keep the draw sheet up to date by entering results as matches and rounds progress.

The draw is presented in the shape of a chart (using the traditional box structure).

When match results are entered, winners are automatically propagated to the next round enabling the draw sheet to be reprinted with the updated results.

Singles and Pairs competitions may be operated. For pairs events, the pairings are drawn as entered. That is, HandicapMaster does not choose partners at random.

More than one Match Play competition may be maintained simultaneously.

This Chapter shows how to prepare and maintain Match Play competitions.

Contents

- Create a Match Play competition and perform a Draw
- Adding, changing and removing players in a Draw
- Players to book into the Draw
- Show handicapping information for matches
- The Draw Chart; Printing Considerations
- Re-running a draw
- Enter results of a Match
- Clear results of a Match
- Re-print the Draw
- Change a Player listed in the Draw
- Add a player in place of a Bye
- Change a Player to a Bye
- Change the date for a round to be played by
- Edit Match Pay Competition Notes
- Apply or change an Entry Fee
- Delete a Draw

See Also

- Stop a Match Play Draw showing on Master Scoreboard

14.2 Create a Match Play competition and perform a Draw

A draw for a new Match Play competition is made using the Match Play Draw window. The entrants are identified and then a random draw is made, placing any byes towards the 'edge' of the draw (as in the best traditions of Club Golf).

To create a Match Play competition

1. Do one of the following:

   - From the **Competitions** menu, click **Match Play Competitions**.

   - On the [Task/Explorer tab](), click **Explorer** and then **Match Play Competitions**.

   - Press CTRL **+** K keys together.

2. Select the **Create a New Competition** task, or press the INSERT key on the keyboard.

3. In the **Name of Competition** box, enter the title of the Knockout.

4. For **Format of Competition**, choose either Singles or Pairs competition (E.g. Pairs competitions are Foursomes, Four Ball, etc.).

5. In the **Eligibility by gender** section both genders are selected by default. You may limit the draw to a single gender by un-ticking one gender.

6. Tick the **Include Visitors** box if you wish to include Visitors in the Draw.

7. Tick the **Allow Players without Handicaps** box if you wish to be offered the option to add players to the draw who do not currently hold a valid handicap.

8. Click **Next >**

9. Tick the **Show handicapping details for matches** box if you wish members to be able to view handicapping information relating to their matches, when they select a match. For example, this will display the number of strokes each player/team is entitled to receive.When selected, enter the handicapping details for this competition, as detailed in the [Display Handicapping information for matches in a match-play competition wizard]().

10. Click **Next >**

11. Add players to the draw. See [add, change or remove players from draw]() for assistance with selecting players into the draw.

    Use the **Find** button to locate a player who is already entered in the draw, in the list of players entered.

    Use the **Auto-Fill** button to populate the **Choose Entrants** list with players either from

    - leading players in a qualifying Stroke-play competition, or

    - [players who have booked]() into an opened competition (Gold editions), or

    - players listed in an opened competition who have signed-in or entered a score (Gold editions).

Selecting qualifiers from qualifying round result

In the **Number of Qualifiers** box, select the number of players who qualified for the Match Play.

You may select up to 64 players to qualify.

In the **Based on** list, identify whether the qualifying players are the leading players based on **Net** or **Gross** scores.

Tick the **Use aggregated scores for multi-round competitions** box if you wish to select the qualifiers from the competition based on overall scores from a multiple-round or alternative day competition.

Click **Next**.

Select the qualifying competition to be used from the list of closed competitions and click **OK**.

For Pairs competitions, use the **Reorder** button to randomise the pairings for each team, if required.

10. Once all of the entrants have been listed (or all those known to have entered at this time), click **Next >**

11. Choose whether to continue and create the Draw, or save the list of entrants without creating a Draw in order to run the Draw at a later date. Do one of the following:

- Select **Run Draw now** and click **Next >**, or

- Select **At another time (save and exit)** and click **OK**.

If you are continuing with the Draw ...

12. Select the **Type of Draw** as either **A 'Knockout' draw with multiple rounds** or **A Single round of matches only**.

Notes:

- A 'Knockout' is a draw with a series of rounds in which only the winners in each round progress to the next stage, until one competitor or team is the final winner.

- A Single round is a set of one-off matches, such as a team match against another club. A Single round draw may also be used when you will be re-drawing partners after each round.

13. If you have selected a *Single Round draw,* tick the **Limit number of matches to minimise or eliminate Byes** box if you only need the draw to contain the minimum number of matches, without increasing the number to match a factor of two. Untick this box if this round is one where the winners will go forward to another (redrawn) round. For example, if you have 12 players in a singles competition, ticking this box would create a draw with 6 matches. Unticking the box would create a draw with 8 matches, including 4 'byes'.

14. In the **Start Competition at** box, choose the appropriate title of the first round. When there are more than three rounds to be played, HandicapMaster offers the choice of '1st Round' or 'Preliminary Round'.

Alternatively, if creating a single-round only draw, in the **This round is** box, choose the appropriate title for the round.

15. Select the **Order of Draw** (order in which the entrants are drawn) as either in random, in General Numerical Order (Seeded) or retain the order the entrants were chosen. See Ordering of Players in Knock Out Draw for further details

Notes:

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- The General Numerical Draw option is only available if there are 64 or fewer entrants.

- When selected, you may limit the *seeding* of players to the leading players only using the **Number of Seeded Players** box. See Ordering of Players in Knock Out Draw for further details.

16. Click **Next >**

17. Unless you have selected to order the draw into a General Numeric Draw (where any required Byes will be placed at the positions for the lowest qualifying places automatically), you may choose where any Byes required to complete the draw are positioned in the draw.

- Select **Top** if you wish to place all of the byes at the top of the draw.

- Select **Bottom** if you wish to place all of the byes at the bottom of the draw.

- Select **Top and Bottom (recommended)** if you wish to place the byes in the traditional positions of top and bottom edges of the draw.

- Select **Custom** if you wish to configure a different layout of byes within the draw. By default, byes will be placed in the same matches as the 'Top and Bottom' selection, from which you may then move the byes around.

  To move a bye, select a match in the **Switch Bye from** box (or click a Bye in the graphical list). Next, select the match where you would like this bye to be moved to in the **to** box (or click a match in the graphical list). Then click **Switch**.

18. Click **Next >**

19. Enter the final play date for each round (selecting whether the dates are *'play by'* or *'play on'* dates). These dates will be included on the draw sheet.

20. Enter the **Last date for match results to be received** date to set a last date that players may enter the match results through the Player Entry system (which is available in the Gold editions of HandicapMaster). I.e. Set this to the last date that you would expect the result of the Final for this competition to be reported through the Player Entry system.

21. Tick the **Include on MasterScoreboard.co.uk** box if you wish to allow this Draw to be published to the MasterScoreboard web site.

22. Tick the **Charge Entry Fee (to members competition purses)** box if you wish to charge an entry fee to each of the entrants' competition purses .This option is only available when the Competition Purse facility is activated in the system and charges will only be raised against member's accounts (not Visitors).

23. Click **Next >**

24. Enter any notes that you wish to append to the end of the report in the **Notes (displayed on Report)** box.

25. Click **Next >**

26. Click **Finish** button to perform the draw.

27. If you have ticked the **Charge Entry Fee (to competition purses)** box, enter a amount to be charged to each entrants purse.

See printing considerations for gaining the best results when printing the Draw Sheet.

Notes:

The Competition Fees option is only available in the Gold editions of HandicapMaster.

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Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

See Also

- Adding, changing and removing players in a Draw

- Players to book into the Draw

- Show handicapping information for matches

- The Draw Chart; Printing Considerations

- Re-running a draw

- Enter results of a Match

- Clear results of a Match

- Re-print the Draw

- Change a Player listed in the Draw

- Add a player in place of a Bye

- Change a Player to a Bye

- Change the date for a round to be played by

- Edit Match Pay Competition Notes

- Apply or change an Entry Fee

- Delete a Draw

See Also

- Stop a Match Play Draw showing on Master Scoreboard

14.3 Add, change or remove players from the Draw

Add a player to the Draw

1. Move the highlight to the row or cell either by

   a. Using the **Up** and **Down** buttons, or

   b. Using the UP or DOWN keys on the keyboard, or

   c. Clicking in the required cell.

2. Do one of the following:

   a. Start typing the name of the player to be added, or

   b. Click the highlighted cell, or

   c. Press the ENTER key, or

   d. Click the **Find** button, or

   e. Click the **Auto Fill** button.

Change a player in the Draw

1. Move the highlight to the row or cell either by

   d. Using the **Up** and **Down** buttons, or

   e. Using the UP or DOWN keys on the keyboard, or

   f. Clicking in the required cell.

2. Select the player to be added to the Draw (see above).

3. Confirm that the player to be added is to replace the existing player.

Remove a player from the Draw

Remove entrants from the list by moving to the entry using the **Up**, **Down** or **Find** buttons, then pressing either the BACKSPACE or DELETE keys on the Keyboard.

See Also

- Create a Match Play competition and perform a Draw
- Players to book into the Draw
- Show handicapping information for matches
- The Draw Chart; Printing Considerations
- Re-running a draw
- Enter results of a Match
- Clear results of a Match
- Re-print the Draw
- Change a Player listed in the Draw

- [Add a player in place of a Bye](#)

- [Change a Player to a Bye](#)

- [Change the date for a round to be played by](#)

- [Edit Match Pay Competition Notes](#)

- [Apply or change an Entry Fee](#)

- [Delete a Draw](#)

See Also

- [Stop a Match Play Draw showing on Master Scoreboard](#)

[Add a player in place of a Bye](#)

14.4 Players booking into a Match Play Draw

The Bookings facility is available in the Gold editions of HandicapMaster

You may ask players to "Book into a Future Competition" (either through Player Entry screens or online through Master Scoreboard) and import the players who have booked to a Match Play Draw.

The booking system in HandicapMaster does not natively support booking Match Play competitions, but with the right combination of Booking Template settings and an opened stroke-play competition, bookings to a Knock out competition can be collected.

To collect bookings into a K.O. Draw

1. Create a Booking Template with an appropriate name and the following settings (recommended):

- As the *Method of Booking*, select **A Place in a Block of Tee Times**.

- Depending upon the maximum number of places available in the draw, use these selections:

Singles KO Competitions

Maximum places in the Draw	Games Start From	Interval	Players Per Tee Time
8	09:00 to 09:30	10 Minutes	2
16	09:00 to 10:10	10 Minutes	2
32	09:00 to 11:30	10 Minutes	2
64	09:00 to 11:30	10 Minutes	4
128	09:00 to 14:10	10 Minutes	4

Pairs KO Competitions

Maximum teams in the Draw	Games Start From	Interval	Players Per Tee Time
8	09:00 to 09:30	10 Minutes	4
16	09:00 to 10:10	10 Minutes	4
32	09:00 to 11:30	10 Minutes	4
64	09:00 to 14:10	10 Minutes	4
128	09:00 to 19:30	10 Minutes	4

- Select **Use 1 Block(s) (each Tee Used)**.

2. Open a stroke-play competition

- Use an appropriate **Template** (either a singles competition for a singles KO draw, or a Pairs competition for a Paris KO Draw).

- For **Name of Competition**, use a name that clarifies the competition is a Match Play competition.

- For **Played (or to be played) on**, use the date when the draw is to be made.

- Select **Use Bookings** and choose the Booking Template created for this draw**.**

3. When performing the K.O. Draw, use the **Auto-Fill** button to import the players booked in to the draw.

See Also

- Create a Match Play competition and perform a Draw

- Adding, changing and removing players in a Draw

- Show handicapping information for matches

- The Draw Chart; Printing Considerations

- Re-running a draw

- Enter results of a Match

- Clear results of a Match

- Re-print the Draw

- Change a Player listed in the Draw

- Add a player in place of a Bye

- Change a Player to a Bye

- Change the date for a round to be played by

- Edit Match Pay Competition Notes

- Apply or change an Entry Fee

- Delete a Draw

See Also

- Stop a Match Play Draw showing on Master Scoreboard

14.5   Ordering of Players in Match Play Draw

When creating a new Match Play Draw, there are three options for how HandicapMaster will allocate players to the draw. These are

1. In a random order

This option will randomly distribute the selected players throughout the draw.

2. Into a General Numerical Draw (Seeded)

This option will use the order of the players, as selected into the entrants list, and allocate them to the draw as recommended by the R&A in the Rules of Golf ('Committee Procedures' Section 5F(1)).

See https://www.randa.org/en/rog/2019/rules/committee-procedures/5f.

This is intended to be used where matches have been determined by a qualifying round. In this case, ensure the players are listed in the entrants list in order of qualification (I.e. with the highest placed qualifier listed at the top, the second place qualifier second, and so on). HandicapMaster will then draw the players into the order as recommended by the R&A.

This option is only available when the number of entrants does not exceed 64.

When selected you may then choose the **Number of Seeded Players**. When this is selected as *All*, a full General Numerical Draw will be conducted using all players in their current position in the entrants list. However, if you wish to limit the *seeding* of players to only a set of the leading players, and perform a random draw for the remaining players, select the **Number of Seeded Players** accordingly. Only the *seeded* players at the top of the entrants list will be drawn into their General Numerical Draw position. Other entrants will be randomly placed throughout the draw.

Note:

The option to draw players into a General Numerical Draw is not available, or applicable, when using options **A single round of matches only** and **Limit number of matches to minimise or eliminate Byes** together.

3. In order as originally selected (placed top to bottom)

This option will use the order of the players in the entrants list to fill out the draw sheet, filling slots from top to bottom on the chart. Use this option to ensure players are drawn in a previously determined order.

See Also

- Create a Match Play competition and perform a Draw

- Adding, changing and removing players in a Draw

- Players to book into the Draw

- Show handicapping information for matches

- The Draw Chart; Printing Considerations

- Re-running a draw

- Enter results of a Match

- Clear results of a Match

- Re-print the Draw

- Change a Player listed in the Draw

- Add a player in place of a Bye

- Change a Player to a Bye

- Change the date for a round to be played by

- Edit Match Pay Competition Notes

- Apply or change an Entry Fee

- Delete a Draw

See Also

- Stop a Match Play Draw showing on Master Scoreboard

14.6   Show handicapping information for matches

You may choose to show handicapping information, including number of strokes received, when a player selects a match through the Player Entry screens or the Master Scoreboard website.

To turn on the display of handicapping information when creating a new draw

When creating a Match Play competition, tick the **Show handicapping details for matches** box and supply the necessary information about handicapping for the competition, as detailed in the Display Handicapping information for matches in a match-play competition wizard

To turn on or off the display of handicapping information for an existing Knock-out competition

1.   Do one of the following:

   • From the **Competitions** menu, click **Match Play Competitions**.

   • On the Task/Explorer tab, click **Explorer** and then **Match Play Competitions**.

   • Press CTRL **+** K keys together.

2.   Select the applicable Match Play competition and right-click. In the pop-up menu, select **Change Handicapping Details** and complete the Display Handicapping information for matches in a match-play competition wizard.

S e e   A l s o

   • Create a Match Play competition and perform a Draw

   • Adding, changing and removing players in a Draw

   • Players to book into the Draw

   • The Draw Chart; Printing Considerations

   • Re-running a draw

   • Enter results of a Match

   • Clear results of a Match

   • Re-print the Draw

   • Change a Player listed in the Draw

   • Add a player in place of a Bye

   • Change a Player to a Bye

   • Change the date for a round to be played by

   • Edit Match Pay Competition Notes

   • Apply or change an Entry Fee

   • Delete a Draw

See Also

   • Stop a Match Play Draw showing on Master Scoreboard

14.7 The Display Handicapping information for matches in a match-play competition wizard

The Display Handicapping information for matches in a match-play competition wizard steps through the stages of configuring handicapping information for a Match-play competition.

You may choose to show handicapping information, including number of strokes received, when a player selects a match through the Player Entry screens or the Master Scoreboard website.

Display of Handicapping Information

1. If you are changing the handicapping information for an existing Match-play competition, you may click **Turn off display of handicapping information** button to cancel the display of handicapping information when members select a match.

Handicapping

2. If the format of the competition is a a pairs knock-out, in the **Format of Competition** list, select the type of pairs competition being run.

3. In the **Strokes Received** list, choose the handicapping allowance that will be used for the competition.

4. Tick the **Limit Strokes Received** box to set a limit on the Strokes Received that players or teams may receive in this competition.

Holes matches will be played over

5. In the **Matches will be played over** list, select the holes over which each match will be played.

Where matches will be played

6. In the **Course matches will be played over** box, select the course to be used for the competition.

Tees matches will be played from

7. In the **Competitors play from these Tee Markers** list, select the applicable Tees to be used for this competition.

8. If the competition is a mixed competition, in the **Competitors playing from different tees** box, select if additional 'mixed tee adjustments' should be applied to handicaps.

9. If the Competition is a Mixed Tee Team Competition, in the **For Scoring, use Pars and Stroke Indexes from** box, choose whether to use the Pars and Stroke Indexes on the Men's or the Ladies' Scorecard (or the player's own Tees, where applicable).

See Also

- Create a Match Play competition and perform a Draw
- Adding, changing and removing players in a Draw
- Players to book into the Draw
- The Draw Chart; Printing Considerations
- Re-running a draw
- Enter results of a Match
- Clear results of a Match

- Re-print the Draw

- Change a Player listed in the Draw

- Add a player in place of a Bye

- Change a Player to a Bye

- Change the date for a round to be played by

- Edit Match Pay Competition Notes

- Apply or change an Entry Fee

- Delete a Draw

See Also

- Stop a Match Play Draw showing on Master Scoreboard

14.8   The Draw Chart; Printing Considerations

When a Match Play draw is completed, a chart is produced showing the matches. This chart is drawn in the familiar 'box' format identifying the progress of the winners of each match. The chart is sized according to the settings of the default printer.

When you request a draw sheet is created, you are given the option to decide how the Chart should be drawn.

In the **Paper Size** box select the size of paper you will be printing the chart on. The larger the paper, more of the complete chart will included. You may change the paper size to any of A0, A1, A2, A3 or A4 sizes. The larger paper sizes are provided so that you may save the report as a PDF document and send this to be professionally printed.

In the **Paper Orientation** box select Portrait or Landscape. Depending upon the number of entrants and the size of paper and font used, one or other may better suit your needs.

In the **Show from Round** box chose which round you would like the chart to start will (that is, the leftmost column included on the chart). This option gives you the chance to print only the initial or the final rounds of the draw, for example.

In the **Font Size (pts)** box choose your preferred font size for the text on the chart (in 'Points'). A value of 8 is about the smallest that is readable if the print-out is not going to be enlarged before displayed.

As you adjust *Paper Size*, *Paper Orientation*, *Show from Round* or *Font Size*, the result of how the chart will be drawn is displayed on screen.

Tick the **Show results of matches** box to display match results on the Draw Sheet.

Tick the **Show Byes in first round** box to list Players who have received a Bye in the first round ,in left-hand column. This will result in the left hand column being filled for all entries, including those getting a Bye to the second round (when the first round is being included in the Report).

Tick the **Show players' first names as Initials only** box to limit the display of players names on the draw sheet to their initials only for their first names. This can prevent long names from limiting the number of columns that may be included on the report.

Tick the **Create list of telephone numbers (using ... when available)** box to create a list of players and their telephone numbers, in addition to the chart. Where more than one telephone number is recorded for a player, the number in the selected field will be shown on the report by preference. If a player does not have a telephone number in that field, the first number located for the player in the sequence "Telephone", then "Mobile", then "Other Tel" will be listed.

See Also

- Create a Match Play competition and perform a Draw

- Adding, changing and removing players in a Draw

- Players to book into the Draw

- Show handicapping information for matches

- Re-running a draw

- Enter results of a Match

- Clear results of a Match

- Re-print the Draw

- Change a Player listed in the Draw

- Add a player in place of a Bye

- Change a Player to a Bye

- Change the date for a round to be played by

- Edit Match Pay Competition Notes

- Apply or change an Entry Fee

- Delete a Draw

See Also

- Stop a Match Play Draw showing on Master Scoreboard

- Change a Player listed in the Draw

- Add a player in place of a Bye

14.9   Re-run a Knockout Draw

It is possible to re-run the draw for a competition using the existing entrants, perhaps adding one or more new entrants to the draw.

To re-run a Draw

1.   Do one of the following:

   • From the **Competitions** menu, click **Match Play Competitions**.

   • On the Task/Explorer tab, click **Explorer** and then **Match Play Competitions**.

   • Press CTRL **+** K keys together.

2.   Select the applicable Match Play competition and right-click. Select **Change Draw**.

3.   Amend the details of the Match Play competition as required.

The existing entrants are automatically selected from the choose entrants list ready for a new draw to be performed. At this time it is possible to add new names to the entrants.

Note

It is not possible to change the gender or inclusion of visitors when editing a draw, these may only be selected when initially setting up the draw.

See Also

   • Create a Match Play competition and perform a Draw

   • Adding, changing and removing players in a Draw

   • Players to book into the Draw

   • Show handicapping information for matches

   • The Draw Chart; Printing Considerations

   • Enter results of a Match

   • Clear results of a Match

   • Re-print the Draw

   • Change a Player listed in the Draw

   • Add a player in place of a Bye

   • Change a Player to a Bye

   • Change the date for a round to be played by

   • Edit Match Pay Competition Notes

   • Apply or change an Entry Fee

   • Delete a Draw

See Also

   • Stop a Match Play Draw showing on Master Scoreboard

14.10 Enter results of a Match

The draw sheets for Match Play competitions are maintained by entering results of the Matches as they progress. The draw chart can then be reprinted if required.

The results of matches may be entered;

1. By the administrator using the main HandicapMaster program, or

2. By players through the Player Entry system (*)

To enter (or re-enter) the results of a Match Play match using HandicapMaster

1.   Do one of the following:

- From the **Competitions** menu, click **Match Play Competitions**.

- On the Task/Explorer tab, click **Explorer** and then **Match Play Competitions**.

- Press CTRL **+** K keys together.

2.   Select the applicable Match Play competition and press ENTER key, or select the **Record Results of Matches** task. This displays each of the matches for this Draw.

3.   Select a match from the list of Matches to enter the result.

4.   Either,

- In the Match Play KO Tasks list, click **Record Result of Match**, or double click the listed match. Select the player or team won the tie and choose the appropriate score for the match, or

- In the Match Play KO Tasks list, click **Enter 'No Result' for a Match** if there was no winner to this match. The opponents awaiting the result of this match will automatically be given a bye in the next round.

The Chart may now be re-printed.

Where the competition is a single-round draw, you may elect to declare the result of a match a halve (*All Square*).

To enable players to be able to enter match results using Player Entry (*)

(*) This option is available in the Gold editions of HandicapMaster.

1. Enable the option in the Player Entry system by

a. On the **Competitions** menu, select **Configure Player Entry...**

b. Double-click an applicable Player Entry Settings Profile.

c. On the *Services* page, tick the **Enter Match Play Match Results** box.

2. Ensure that a future *Last Date for Match Results* has been configured. Only matches for Match Play competitions where the Last date for match results has not passed will be offered to players by the Player Entry system.

a. Do one of the following:

- From the **Competitions** menu, click **Match Play Competitions**.

- On the Task/Explorer tab, click **Explorer** and then **Match Play Competitions**.

- Press CTRL + K keys together.

The Last Date for Match Results will be displayed in the list alongside each competition (if configured). To change the configured date for a competition:

b. Right-click over the applicable competition and select **Change Last Date for Match Results** in the pop-up menu.

c. Enter a revised date and click **OK**.

To enable players to be able to enter match results using Master Scoreboard (*)

(*) This option is available in the Gold editions of HandicapMaster for customers using a CLOUD edition.

1. Enable the option in the Online Score Entry system by

a. In the left-hand column, click **Competitions** place.

b. On the right-hand side, double-click **Online Score Entry**.

c. Tick option **Enter Knock-out Match Results**.

2. Ensure that a future *Last Date for Match Results* has been configured. Only matches for Match Play competitions where the Last date for match results has not passed will be offered to players by the Player Entry system.

b. Do one of the following:

- From the **Competitions** menu, click **Match Play Competitions**.

- On the [Task/Explorer tab](#), click **Explorer** and then **Match Play Competitions**.

- Press CTRL + K keys together.

The Last Date for Match Results will be displayed in the list alongside each competition (if configured). To change the configured date for a competition:

d. Right-click over the applicable competition and select **Change Last Date for Match Results** in the pop-up menu.

e. Enter a revised date and click **OK**.

See Also

- [Create a Match Play competition and perform a Draw](#)

- [Adding, changing and removing players in a Draw](#)

- [Players to book into the Draw](#)

- [Show handicapping information for matches](#)

- [The Draw Chart; Printing Considerations](#)

- [Re-running a draw](#)

- [Clear results of a Match](#)

- [Re-print the Draw](#)

- [Change a Player listed in the Draw](#)

- [Add a player in place of a Bye](#)

- [Change a Player to a Bye](#)

- [Change the date for a round to be played by](#)

- [Edit Match Pay Competition Notes](#)

- [Apply or change an Entry Fee](#)

- [Delete a Draw](#)

See Also

- [Stop a Match Play Draw showing on Master Scoreboard](#)

14.11 Clear a result from a Match

The draw sheets for Match Play Knockout competitions are maintained by entering results of the Matches as they progress. The draw chart can then be reprinted if required.

To clear a result of a match previously entered

1.   Do one of the following:

- From the **Competitions** menu, click **Match Play Competitions**.

- On the Task/Explorer tab, click **Explorer** and then **Match Play Competitions**.

- Press CTRL **+** K keys together.

2.   Select the applicable Match Play competition and press ENTER key, or select the **Record Results of Matches** task. This displays each of the matches for this Draw.

3.   Select a match from the list of Matches to and right-click. Select **Clear Result from Match #...**

See Also

- Create a Match Play competition and perform a Draw

- Adding, changing and removing players in a Draw

- Players to book into the Draw

- Show handicapping information for matches

- The Draw Chart; Printing Considerations

- Re-running a draw

- Enter results of a Match

- Re-print the Draw

- Change a Player listed in the Draw

- Add a player in place of a Bye

- Change a Player to a Bye

- Change the date for a round to be played by

- Edit Match Pay Competition Notes

- Apply or change an Entry Fee

- Delete a Draw

See Also

- Stop a Match Play Draw showing on Master Scoreboard

14.12 Re-print the Draw

The draw sheets for Match Play Knockout competitions are maintained by entering results of the Matches as they progress. The draw chart can then be reprinted if required.

To reprint the Draw Chart

1. Do one of the following:

   • From the **Competitions** menu, click **Match Play Competitions**.

   • On the Task/Explorer tab, click **Explorer** and then **Match Play Competitions**.

   • Press CTRL + K keys together.

2. Select the applicable Match Play competition and press ENTER key. This displays each of the matches for this Draw.

3. In the Match Play Tasks list, click **Re-Print Draw Sheet** to reprint the draw sheet for the chosen competition (from the Match Play Results option). See printing considerations.

See Also

• Create a Match Play competition and perform a Draw

• Adding, changing and removing players in a Draw

• Players to book into the Draw

• Show handicapping information for matches

• The Draw Chart; Printing Considerations

• Re-running a draw

• Enter results of a Match

• Clear results of a Match

• Change a Player listed in the Draw

• Add a player in place of a Bye

• Change a Player to a Bye

• Change the date for a round to be played by

• Edit Match Pay Competition Notes

• Apply or change an Entry Fee

• Delete a Draw

See Also

• Stop a Match Play Draw showing on Master Scoreboard

14.13 Change a player listed in the Draw

The draw sheets for Match Play Knock-out competitions are maintained by entering results of the Matches as they progress. The draw chart can then be reprinted if required.

If a wrong player has been drawn in the draw, the Player may substituted for another Player as follows:

To change a Player listed in the Draw

1.   Do one of the following:

- From the **Competitions** menu, click **Match Play Competitions**.

- On the Task/Explorer tab, click **Explorer** and then **Match Play Competitions**.

- Press CTRL + K keys together.

2.   Select the applicable Match Play competition and press ENTER key, or select the **Record Results of Matches** task. This displays each of the matches for this Draw.

3.   Select any match from the list of Matches that includes the Player to be changed and right-click. Select **Change a Player**.

4.   Choose the Player to be changed, then select a new Player.

See Also

- Create a Match Play competition and perform a Draw

- Adding, changing and removing players in a Draw

- Players to book into the Draw

- Show handicapping information for matches

- The Draw Chart; Printing Considerations

- Re-running a draw

- Enter results of a Match

- Clear results of a Match

- Re-print the Draw

- Add a player in place of a Bye

- Change a Player to a Bye

- Change the date for a round to be played by

- Edit Match Pay Competition Notes

- Apply or change an Entry Fee

- Delete a Draw

See Also

- Stop a Match Play Draw showing on Master Scoreboard

14.14 Add a player in place of a Bye

The draw sheets for Match Play competitions are maintained by entering results of the Matches as they progress. The draw chart can then be reprinted if required.

If a player has been missed from the draw, say, a Player may substituted for a Bye as follows:

To add a Player in place of a Bye in the Draw

1. Do one of the following:

    - From the **Competitions** menu, click **Match Play Competitions**.

    - On the Task/Explorer tab, click **Explorer** and then **Match Play Competitions**.

    - Press CTRL + K keys together.

2. Select the Match Play competition and press ENTER key, or select the **Record Results of Matches** task. This displays each of the matches for this Draw.

3. Select a match containing a Bye from the list of Matches and right-click. Select **Change a Player**.

4. Choose the Bye as the player to change, then select the replacement Player.

See Also

- Create a Match Play competition and perform a Draw

- Adding, changing and removing players in a Draw

- Players to book into the Draw

- Show handicapping information for matches

- The Draw Chart; Printing Considerations

- Re-running a draw

- Enter results of a Match

- Clear results of a Match

- Re-print the Draw

- Change a Player listed in the Draw

- Change a Player to a Bye

- Change the date for a round to be played by

- Edit Match Pay Competition Notes

- Apply or change an Entry Fee

- Delete a Draw

See Also

- Stop a Match Play Draw showing on Master Scoreboard

14.15 Change a Player to a Bye

The draw sheets for Match Play competitions are maintained by entering results of the Matches as they progress. The draw chart can then be reprinted if required.

If a player has included in error then a Bye may be substituted for a Player as follows:

To change a Player to a Bye in the Draw

1. Do one of the following:

   - From the **Competitions** menu, click **Match Play Competitions**.

   - On the Task/Explorer tab, click **Explorer** and then **Match Play Competitions**.

   - Press CTRL **+** K keys together..

2. Select the Match Play competition and press ENTER key, or select the **Record Results of Matches** task. This displays each of the matches for this Draw.

3. Select a match containing a Player from the list of Matches and right-click. Select **Change Player to a Bye**.

4. Choose the player to change to a bye.

Notes:

The following limitations apply:

- The player selected must be in the first round.

- There must not be a Bye in the same match.

See Also

- Create a Match Play competition and perform a Draw

- Adding, changing and removing players in a Draw

- Players to book into the Draw

- Show handicapping information for matches

- The Draw Chart; Printing Considerations

- Re-running a draw

- Enter results of a Match

- Clear results of a Match

- Re-print the Draw

- Change a Player listed in the Draw

- Add a player in place of a Bye

- Change the date for a round to be played by

- Edit Match Pay Competition Notes

- Apply or change an Entry Fee

- Delete a Draw

See Also

- Stop a Match Play Draw showing on Master Scoreboard

14.16 Change the date for a round to be played by

The draw sheets for Match Play competitions are maintained by entering results of the Matches as they progress. The draw chart can then be reprinted if required.

To change a previously entered last play date for a round:

To change the date a round has to be played on or by

1.   Do one of the following:

- From the **Competitions** menu, click **Match Play Competitions**.

- On the Task/Explorer tab, click **Explorer** and then **Match Play Competitions**.

- Press CTRL **+** K keys together.

2.   Select the applicable Match Play competition and press ENTER key, or select the **Record Results of Matches** task. This displays each of the matches for this Draw.

3.   Select any match from the list of Matches for the round to be amended and right-click. Select **Change Date for Round Matches**.

4.   Enter a new date for this round of matches.

See Also

- Create a Match Play competition and perform a Draw

- Adding, changing and removing players in a Draw

- Players to book into the Draw

- Show handicapping information for matches

- The Draw Chart; Printing Considerations

- Re-running a draw

- Enter results of a Match

- Clear results of a Match

- Re-print the Draw

- Change a Player listed in the Draw

- Add a player in place of a Bye

- Change a Player to a Bye

- Edit Match Pay Competition Notes

- Apply or change an Entry Fee

- Delete a Draw

See Also

- Stop a Match Play Draw showing on Master Scoreboard

14.17 Edit Match Play Competition Notes

To edit a Match Play competition notes

1.   Do one of the following:

- From the **Competitions** menu, click **Match Play Competitions**.

- On the Task/Explorer tab, click **Explorer** and then **Match Play Competitions**.

- Press CTRL **+** K keys together.

2.   Select the applicable Match Play competition and right-click. In the pop-up menu, select **Edit Notes**.

3.   Edit the notes and click **OK** to save them.

See Also

- Create a Match Play competition and perform a Draw

- Adding, changing and removing players in a Draw

- Players to book into the Draw

- Show handicapping information for matches

- The Draw Chart; Printing Considerations

- Re-running a draw

- Enter results of a Match

- Clear results of a Match

- Re-print the Draw

- Change a Player listed in the Draw

- Add a player in place of a Bye

- Change a Player to a Bye

- Change the date for a round to be played by

- Apply or change an Entry Fee

- Delete a Draw

See Also

- Stop a Match Play Draw showing on Master Scoreboard

14.18 Apply or change an Entry Fee

If you have the Competition Purse facility activated, you may charge an Entry Fee to players listed in the draw, or change a Fee already charged to players.

To apply or change an Entry Fee for a Match Play draw

1.   Do one of the following:

- From the **Competitions** menu, click **Match Play Competitions**.

- On the Task/Explorer tab, click **Explorer** and then **Match Play Competitions**.

- Press CTRL **+** K keys together..

2.   Select the Match Play competition and click with the right-hand mouse button over the selected competition.

3.   Select **Entry Fee** in the pop-up menu.

4.   Enter the required fee and click **OK**.

Notes:

- The Competition Fees option is only available in the Gold editions of HandicapMaster. Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

- You may also apply an entry fee when creating the draw, or when redrawing the draw.

See Also

- Create a Match Play competition and perform a Draw

- Adding, changing and removing players in a Draw

- Players to book into the Draw

- Show handicapping information for matches

- The Draw Chart; Printing Considerations

- Re-running a draw

- Enter results of a Match

- Clear results of a Match

- Re-print the Draw

- Change a Player listed in the Draw

- Add a player in place of a Bye

- Change a Player to a Bye

- Change the date for a round to be played by

- Edit Match Pay Competition Notes

- Delete a Draw

See Also

- [Stop a Match Play Draw showing on Master Scoreboard](#)

14.19 Delete a Knockout competition

When a Knockout competition has been completed, you may delete the draw as follows:

To clear a Knockout competition

1.   Do one of the following:

   - From the **Competitions** menu, click **Match Play Competitions**.

   - On the Task/Explorer tab, click **Explorer** and then **Match Play Competitions**.

   - Press CTRL **+** K keys together.

2.   Select the applicable Match Play competition and press DELETE Key, or right-click and select **Delete Competition**.

3.   Confirm the Deletion.

Notes:

- After deleting a Match Play competition any details on MasterScoreboard.co.uk will be deleted when you next publish to MasterScoreboard.co.uk

- You do not need to delete an existing Match Play competition before starting additional competitions.

See Also

- Create a Match Play competition and perform a Draw

- Adding, changing and removing players in a Draw

- Players to book into the Draw

- Show handicapping information for matches

- The Draw Chart; Printing Considerations

- Re-running a draw

- Enter results of a Match

- Clear results of a Match

- Re-print the Draw

- Change a Player listed in the Draw

- Add a player in place of a Bye

- Change a Player to a Bye

- Change the date for a round to be played by

- Edit Match Pay Competition Notes

- Apply or change an Entry Fee

See Also

- Stop a Match Play Draw showing on Master Scoreboard

Chapter

15

Handicapping

15   Handicapping

15.1   Introduction

About Handicapping in the Local handicapping editions

The following chapter describes how the handicapping operates in the Local Handicapping editions of HandicapMaster, and how you may influence this to best suit your organisation.

Contents

- About Local Handicapping

- How Tee Handicap and Strokes Received are calculated

- Allocating a player an initial Handicap

- Change the Handicapping Rules used

- The Configure Handicapping Rules Wizard

- Viewing Handicap Adjustments

- Altering the number of winning positions

- Adjusting the Handicap of a player

- Freezing the Handicap of a player

- Withdrawing and re-instating a player's Handicap

- Compensating for Course Difficulty

- Recording a General Play Score

15.2   About Local Handicapping

In the 'local' editions of HandicapMaster, you have a choice of how the Handicapping calculations should be run by HandicapMaster.

Handicaps may automatically updated when players return scores either based on …

- Incremental adjustments

  The difference between the 'Handicap the player played to' and their 'current Handicap' will determine whether their Handicap is reduced or increased.

- Average of the player's best recent scores

- Reductions where players win competitions (can be combined with either of the previous two).

Finally, you may elect to turn all of these off and just maintain handicaps for players through manual adjustments.

Player's Handicap, Tee Handicap and Strokes Received

By default, each player will have a *Handicap* calculated using the average of their best scores from their most recent scores. For example, this might be the average of their best 5 scores from their most recent 10. You may change these parameters to best suit your organisation. This *Handicap* is an number calculated to one decimal place.

When a player plays a round, a *Tee Handicap* is calculated to represent the player's handicap to be used on that course. This is their *Handicap* rounded to the nearest whole number.

Optionally, you may apply a Course Difficulty factor to their *Tee Handicap*, increasing their *Tee Handicap* by a percentage, for the purpose of creating fairer competition results (such as when a competition is played over a particularly long or difficult course).

This *Tee Handicap* may further be adjusted by applying handicap allowances (such as for a competition) to create *Strokes Received*.

The player's *Strokes Received* is the number of Handicap strokes they will receive for that round.

See How Tee Handicap and Strokes Received are calculated.

If you opt to apply *incremental adjustments* instead, then player's handicaps will be adjusted after each score based upon the difference between the player's current handicap and the handicap they effectively played to when returning the score. This is called their *Net Differential* and is defined as "Handicap played-to minus Current Handicap".

Where the Net Differential (rounded to the nearest whole number) is below zero, a decrement will be taken from the player's handicap for every full shot below zero. Where the Net Differential is above zero (and possibly above a *Buffer Zone*) then a set amount is added to the player's handicap.

Initial Handicaps

Before scores may be entered into the system for a new player added to the system, you must allocate an Initial Handicap to that player.

Basis of Handicapping

As previously mentioned, there are three main inputs to the calculation of a player's Handicap. These are

1. Optionally, applying incremental adjustments,

2. Optionally, the average of their best scores from their record scores, and

3. Optionally, where a player finishes in a competition.

You may change these parameters by configuring the handicapping rules.

Adjusted Gross Score

Players scores, as they are fed into the calculation, are based upon the number of strokes the player has taken for the round. This total is adjusted to take account of the following situations:

• The player exceeds their maximum hole score,

• A hole is not played, or

• A hole is started but the player does not hole out.

The resultant score is called their *Adjusted Gross Score*.

Handicap Played-to

A *Handicap Played-to* value is calculated. This is the player's *Adjusted Gross Score* less the Reference Score for the course played.

Handicap Adjustments are then based upon the player's *Handicap Played-to* values.

See Also

• How Tee Handicap and Strokes Received are calculated

• Allocating a player an initial Handicap

• Change the Handicapping Rules used

• The Configure Handicapping Rules Wizard

• Viewing Handicap Adjustments

• Altering the number of winning positions

• Adjusting the Handicap of a player

• Freezing the Handicap of a player

• Withdrawing and re-instating a player's Handicap

• Compensating for Course Difficulty

• Recording a General Play Score

15.3 How Tee Handicap and Strokes Received are calculated

Strokes ReceivedOnly available when Handicapping is being done locally.

Tee Handicap

A player's Tee Handicap is calculated as their Handicap rounded to the nearest whole number.

```
Tee Handicap = Round(Handicap)
```

Course Difficulty Factor

However, if a [Course Difficulty factor has been applied to the Course Scorecard](#), then the player's Handicap is multiplied by a set percentage for that course, before being rounded.

```
Tee Handicap = Round(Handicap + (Handicap x Course Difficulty%))
```

For example, if John's Handicap is 21.4 and the Course Difficulty factor has been set at 5%, his Tee Handicap will be

Tee Handicap = Round(21.4 x 1.05) = Round(22.47) = 22

Also, you may choose whether HandicapMaster adjusts player's Tee Handicap with a "Reference Score minus Par" adjustment. In this case, the *Tee Handicap* then becomes

```
Tee Handicap = Round(Handicap + (Handicap x Course Difficulty%) + (Reference
Score - Par))
```

Strokes Received

The number of Handicap strokes a player receives (their *Strokes Received*) is their *Tee Handicap* multiplied by any Handicap Allowance for the competition.

```
Strokes Received = Tee Handicap x Handicap Allowance
```

How to select whether the 'Course Difficulty minus Par' adjustment is applied

You may change this setting in the *Configure Handicapping Rules* wizard.

1. On the **Handicapping** menu, click **Configure Handicapping Rules**

2. This will start the [Configure Handicapping Rules Wizard](#).

3. Change your selection at the applicable option in the wizard.

See Also

- [About Local Handicapping](#)
- [Allocating a player an initial Handicap](#)
- [Change the Handicapping Rules used](#)
- [The Configure Handicapping Rules Wizard](#)
- [Viewing Handicap Adjustments](#)
- [Altering the number of winning positions](#)
- [Adjusting the Handicap of a player](#)

- [Freezing the Handicap of a player](#)

- [Withdrawing and re-instating a player's Handicap](#)

- [Compensating for Course Difficulty](#)

- [Recording a General Play Score](#)

15.4 Allocating a player an initial Handicap

Only available when Handicapping is being done locally.

In order to be able to enter scores for a player, they must be allocated a starting Handicap.

This starting index will be retained until the player has returned the minimum number of scores required for the averaging to start.

Allocate a player an Initial Handicap

1. On the **Handicapping** menu, click **Allocate/Update an Initial Handicap...**

2. Choose the Player and click **OK**.

3. In the **Handicap** box, enter the initial Handicap for this player.

4. Click **OK**.

Notes:

* The minimum handicap that may be entered is +10. The maximum handicap that may be entered is 54.

Amend an allocation already made for a player

To change an Initial Handicap Allocation for a player, do this...

1. Do one of the following:

* On the **Reports** menu, click **Player Record**, then **Playing Records**, or
* On the Keyboard, press the SHIFT and F1 function keys together, or
* Click the **Records** button on the main toolbar, or
* Right-click over the player entry in the All Members list and select **Playing Records** in the pop-up menu.

2. Choose the Player and click **OK**.

3. Above the playing records, click **Handicap Record** tab.

4. Double-click the *Initial Handicap* entry.

5. After amending the allocation, click **OK**.

Cancel an allocation for a player

To delete an Initial Handicap Allocation for a player, do this...

1. Do one of the following:

* On the **Reports** menu, click **Player Record**, then **Playing Records**, or
* On the Keyboard, press the SHIFT and F1 function keys together, or
* Click the **Records** button on the main toolbar, or
* Right-click over the player entry in the All Members list and select **Playing Records** in the pop-up menu.

2. Choose the Player and click **OK**.

3. Above the playing records, click **Handicap Record** tab.

4. Highlight the *Initial Handicap* entry in the list with a single click.

5. Press the `DELETE` key on the keyboard

The player will revert to 'No Handicap' status.

Note: This is only possible if the player does not have any other entries in their handicap record. Where a player has other entries in their record, you will be given the option to change the Initial Handicap entry value instead.

See Also

- About Local Handicapping

- How Tee Handicap and Strokes Received are calculated

- Change the Handicapping Rules used

- The Configure Handicapping Rules Wizard

- Viewing Handicap Adjustments

- Altering the number of winning positions

- Adjusting the Handicap of a player

- Freezing the Handicap of a player

- Withdrawing and re-instating a player's Handicap

- Compensating for Course Difficulty

- Recording a General Play Score

15.5 Change the Handicapping Rules used

Only available when Handicapping is being done locally.

Users of the "local" editions of HandicapMaster may select their own rules for Handicapping. These rules can be based on:

- applying incremental adjustments,
- an average of the player's recent scores
- where the player finishes in a competition

You have a choice as to whether player's Handicap values are calculated with any of these options, and you may combine 'where the player finishes in a competition' with either of the other two (but not both).

Handicap based on incremental adjustments

When selected, player's handicaps will be adjusted after each score based upon the difference between the player's current handicap and the handicap they effectively played to when returning the score. This is called their *Net Differential* and is defined as "Handicap played-to minus Current Handicap".

Where the Net Differential (rounded to the nearest whole number) is below zero, a decrement will be taken from the player's handicap for every full shot below zero. Where the Net Differential is above zero (and possibly above a *Buffer Zone*) then a set amount is added to the player's handicap.

Handicap based on the Player's best recent scores

When selected, the Handicap is calculated using the average of the best recent scores. You may configure both the number of recent scores considered and the number of best scores in the calculations.

If required, the Handicap can be set to a percentage of the average value.

Adjustments based on the Player's Position in a competition

These rules allow for adjustments to handicaps based on the position of the player in the competition, regardless of their score. Adjustments are only made for players identified as Overall or Division winners.

After calculating the handicap using the average of recent scores, any adjustments based on competition position are applied to the Handicap. The adjustments from all the scores consider for the averaging process are used (not just the best scores), although a shorter adjustment "lifetime" may be specified.

Competitions played over more than one round

For Alternative Day or Multiple Round competitions, the players' overall positions in the **aggregated** results are used. Any handicap adjustments are made on the last round of the competition. If a player does not play the last round, the adjustment is made in the last round in which he/she played.

Note: As the overall positions (and handicap adjustments) are calculated as each round is closed, handicap adjustments may initially be applied to an intermediate round. When the next round is closed, handicap adjustments will be removed from the earlier rounds and recalculated using the new aggregate positions. Between the first and last rounds of a competition played over multiple rounds, a player's handicap may not be accurate, as the adjustment and its timing are likely to change until the final round is closed.

To Configure Local Handicapping

1. On the **Handicapping** menu, click **Configure Handicapping Rules**

2. This will start the [Configure Handicapping Rules Wizard](#).

See Also

- [About Local Handicapping](#)

- [How Tee Handicap and Strokes Received are calculated](#)

- [Allocating a player an initial Handicap](#)

- [The Configure Handicapping Rules Wizard](#)

- [Viewing Handicap Adjustments](#)

- [Altering the number of winning positions](#)

- [Adjusting the Handicap of a player](#)

- [Freezing the Handicap of a player](#)

- [Withdrawing and re-instating a player's Handicap](#)

- [Compensating for Course Difficulty](#)

- [Recording a General Play Score](#)

15.6 The Configure Handicapping Rules Wizard

Only available when Handicapping is being done locally.

The Configure Handicapping Rules Wizard allows Local Handicapping rules to be set up.

Handicapping Configuration

1. Select the **Maximum Handicap** players will be allowed to hold.

2. You may choose to have an adjustment equal to 'Course rating minus Par' added to player's Tee Handicap by selecting **An adjustment of "Reference Score minus Par" added** option.

    When selected, the formula for Strokes Received adjustment when players in the competition are playing from a combination of different tees is also adjusted.

Adjusting Handicaps

Adjustments to player's Handicap may be made based on

- Incremental adjustments, or

- Average of the player's best recent scores, or

- Reductions where players win competitions.

To use Incremental Adjustments

1. Tick **Incremental Adjustments** box to turn on Handicap calculations based upon the incremental system.

2. Click **Next>>**

3. In the **Number of Handicap Categories** box, enter the number of "ranges" of handicaps you wish to configure. You can vary the handicap adjustments between the ranges (so higher handicaps can be reduced more quicker than low handicaps, for example). You may define up to 5 categories of Handicap.

4. For each category of Handicap, enter the highest Handicap that falls within each category into the **Maximum Handicap in Category** box(es).

5. Click **Next>>**

6. For each category of Handicap, in the **Score Above Handicap** box(es), enter the amount that a player's handicap should be increased where their Handicap Played-to value is higher than their current Handicap (i.e., their Net Differential is above zero) and optionally outside of a Buffer Zone.

7. For each category of Handicap, in the **Score Below Handicap** box(es), enter the amount that a player's Handicap should be reduced where their Handicap Played-to value is lower than their current handicap (i.e., their Net Differential is below zero). The player's Net Differential is rounded to the nearest whole number and these decrements are taken from the players Handicap, once for each stroke below zero.

8. Click **Next>>**

9. For each category of Handicap, in the **Buffer Zone** box(es), optionally enter an amount for which if a player's Net Differential is lower or equal to the amount entered, their Handicap will not be increased. Using this, you may prevent player's Handicap being increased when they in fact played close to their existing Handicap.

10.Click **Next>>**

To use 'Averaging'

1. Tick **Average of the players best recent scores** box to turn on Handicap calculations based upon the averaging system

2. Click **Next>>**

3. Select the required number of best scores and the number of recent scores to consider when calculating the Handicap. There are several pre-defined options or select **Other** to define custom values.

4. If using the *Other* option, set the number of **Best Scores** from which the average is to be calculated.

5. If using the *Other* option, set the number of **Recent Scores** from which the best scores are selected.

6. If using the *Other* option, set the percentage of the average score which is used for the Handicap.

7. Tick **Their Handicap may not increase by more than** box if you wish to set a limit to how much a player's Handicap may increase each time a score is added to their record, and enter the applicable limit. This may help prevent erratic increases in player's Handicaps when they have a limited number of scores on their record.

8. Click **Next>>**

9. If using the *Other* option, for new players with fewer than the full number of recent scores available, it is possible to configure alternative values for the number of best scores to use. A fixed adjustment to the calculated average may also be defined. If using the *Other* option, for each number of scores available:

    - Set the number of best scores to use for the average

    - Set the additional adjustment to apply to the calculated average.

10. Click **Next>>**

To use Handicap Reductions for Competition Winners

Adjustments to the Handicap may be made based on the position of the player in the competition. Adjustments are only made for players identified as Overall or Division winners.

1. Tick **Where players finish overall in competitions** box to make Handicap adjustments based on position.

2. To add an adjustment click **Add**.

    a) Enter the position number for the adjustment.

    b) Select with the position is **Overall** (taken from Overall Winners) or **In Division** (taken from Division Winners).

    c) Enter the amount by which the average-based Handicap is reduced.

    d) Click **OK**. The adjustment is added to the list.

3. To alter an adjustment, select (highlight) the adjustment in the list and click **Amend**.

4. Change the adjustment amount as required and click **OK.**

5. To remove an adjustment, select (highlight) the adjustment in the list and click **Delete**.

6. Tick the **Increase handicaps of players unplaced in competitions by** box to add an increase in Handicap for any player *unplaced* in the competition, and then enter the handicap adjustment to be applied. "Unplaced" are any players not identified as overall or divisional winners, or runners-up, etc.

7. Tick **Exclude Visitors when calculating positions** to base Handicap adjustments on Members-only results.For handicapping purposes, Visitors may be excluded when calculating players' positions in the competition. This does not affect the actual competition results, only the handicap adjustments.

8. Tick **Remove adjustment after .. competitions** if you wish to specify an adjustment lifetime which is less than the number of scores considered when calculating the average-based Handicap. Set the required number of competitions for which the adjustment is included.

    Note: This option is not available when also using 'Incremental Adjustments' for handicapping.

    Adjustments are normally ignored when the score for the competition generating the adjustment is no longer included in the recent scores used in the averaging calculation. However, it may be ignored earlier by enabling this option. For example, with the Handicap based on the best 8 scores from the last 20 scores, an adjustment would last for 20 scores. Setting the option to remove the adjustment after 5 competitions means that it is ignored after only 5 subsequent scores.

9. When the required adjustments have all been defined, click **Next>>**.

If not using 'Incremental' or 'Averaging'

When not using either incremental adjustments or averaging, you may elect for any manual adjustments made to Handicaps will count until players have returned enough additional scores onto their Handicap record. Then the adjustments will 'expire' and no longer count towards their Handicap.

1. Tick the **Expire manual adjustments after** box and enter the number of additional scores required before an adjustment expires, if you wish manual adjustments to expire.

Complete the Configure Handicapping Rules Wizard

13. Click **Finish**

    Note: When the Wizard is completed, the Handicap Records of Players may be recalculated.

See Also

- About Local Handicapping

- How Tee Handicap and Strokes Received are calculated

- Allocating a player an initial Handicap

- Change the Handicapping Rules used

- Viewing Handicap Adjustments

- Altering the number of winning positions

- Adjusting the Handicap of a player

- Freezing the Handicap of a player

- Withdrawing and re-instating a player's Handicap

- Compensating for Course Difficulty

- Recording a General Play Score

15.7 Viewing Handicap Adjustments

Only available when Handicapping is being done locally.

Adjustments for the winning positions in competitions are applied to local handicaps after calculating the average-based value.

Adjustments from one competition

When local handicaps are adjusted for competition winners, a special Results Report is generated. This report is not published to Master Scoreboard and has limited configuration options.

To view the adjustments arising from a competition, do one of the following.

- Select the *Local Handicapping* report in the list with a single click and then click the **View** button.

- Double-click the *Local Handicapping* report in the list

Note:

For Alternative Day or Multiple Round competitions, the players' overall positions in the **aggregated** results are used. Any handicap adjustments are recorded for the last round of the competition. If a player does not play the last round, the adjustment is recorded for the last round in which he/she played.

Adjustments from multiple competitions

To view the all the adjustments for a period of time (multiple competitions):

1. Do one of the following:

- On the Task/Explorer tab, click **Tasks** and then in the **Places** list in the left-hand column, select the **Reports** item.

- Select the **Handicapping** tab and double-click on **Position-based Handicap Adjustments**.

or

- Click on the **Reports** menu heading and select **Handicapping Reports** from the drop-down menu.

- Select **Position-based Handicap Adjustments**.

2. Select *who* to include in the report.

3. Select the *time period* for the report.

4. Choose *how* the report is ordered.

- **Players listed alphabetically** – each player is listed with all the adjustments in the report period (most recent first). The report also shows the number of new scores after which the adjustment is ignored.

- **Competitions in Ascending Date Order** – each competition is listed with the resulting adjustments for each player.

5. Click **OK** to produce the report

See Also

- [About Local Handicapping](#)

- [How Tee Handicap and Strokes Received are calculated](#)

- [Allocating a player an initial Handicap](#)

- [Change the Handicapping Rules used](#)

- [The Configure Handicapping Rules Wizard](#)

- [Altering the number of winning positions](#)

- [Adjusting the Handicap of a player](#)

- [Freezing the Handicap of a player](#)

- [Withdrawing and re-instating a player's Handicap](#)

- [Compensating for Course Difficulty](#)

- [Recording a General Play Score](#)

15.8   Altering the number of winning positions

Only available when Handicapping is being done locally.

Local handicap adjustments are restricted to the players identified as overall or division winners.

Players only receive a handicap adjustment if the player is identified as an overall or division winner **and** a corresponding adjustment has been configured in the Handicapping Rules.

Initially the number of winners is taken from the competition template. If required, the number of winners for local handicap adjustments can be amended independently of the winners on the competition results.

1. View the list of Results Reports for the competition.

2. Select the *Local Handicapping* report in the list with a single click.

3. Click **Edit Report** button on the toolbar.

4. Complete the Competition Results Wizard to change the results view.

Note:

- Only the competition name, number of winners, divisions and report notes can be changed for this report.

- Changing the number of winners or divisions recalculates the adjustments applied to players' handicaps.

See Also

- About Local Handicapping

- How Tee Handicap and Strokes Received are calculated

- Allocating a player an initial Handicap

- Change the Handicapping Rules used

- The Configure Handicapping Rules Wizard

- Viewing Handicap Adjustments

- Adjusting the Handicap of a player

- Freezing the Handicap of a player

- Withdrawing and re-instating a player's Handicap

- Compensating for Course Difficulty

- Recording a General Play Score

15.9 Adjusting the Handicap of a player

Only available when Handicapping is being done locally.

You may adjust a player's Handicap, setting a new Handicap for the player.

You may reset the Handicap by applying an adjustment to each of the most recent scores in the scoring record, to achieve the chosen Handicap that is determined to better reflect the player's demonstrated ability.

To adjust a player's Handicap

1. Do one of the following:

   - On the **Handicapping** menu, click **Adjust Handicap**. Choose the Player and click **OK**.

   - Right-click over the player entry in the All Members list and select **Adjust Handicap** in the pop-up menu.

2. Enter the revised Handicap for the player.

3. Click **OK**.

See Also

- About Local Handicapping
- How Tee Handicap and Strokes Received are calculated
- Allocating a player an initial Handicap
- Change the Handicapping Rules used
- The Configure Handicapping Rules Wizard
- Viewing Handicap Adjustments
- Altering the number of winning positions
- Freezing the Handicap of a player
- Withdrawing and re-instating a player's Handicap
- Compensating for Course Difficulty
- Recording a General Play Score

15.10 Freezing the Handicap of a player

Only available when Handicapping is being done locally.

You may 'freeze' a player's Handicap, overriding any newly calculated index value.

There are two ways in which the Handicap may be restricted. These are

1. The Handicap may be frozen at a chosen value. It will not change until the Freeze is removed.

2. The Handicap may be prevented from increasing, whilst still allowing reductions. The index will only ever decrease, until the Freeze is removed.

To apply a freeze to a player's Handicap

1. Do one of the following:

   - On the **Handicapping** menu, click **Freeze Handicap**. Choose the Player and click **OK**.

   - Right-click over the player entry in the All Members list and select **Freeze Handicap** in the pop-up menu.

2. Do one of the following:

   - Select **Not Change - Is Frozen** and then confirm the Index value the Handicap will be frozen at, or

   - Select **Not Increase**

3. Click **OK**.

To cancel a freeze from a player's Handicap

1. Do one of the following:

   - On the **Handicapping** menu, click **Freeze Handicap**. Choose the Player and click **OK**.

   - Right-click over the player entry in the All Members list and select **Freeze Handicap** in the pop-up menu.

2. Select **Change up and down - No restriction**.

3. Click **OK**.

See Also

- About Local Handicapping

- How Tee Handicap and Strokes Received are calculated

- Allocating a player an initial Handicap

- Change the Handicapping Rules used

- The Configure Handicapping Rules Wizard

- Viewing Handicap Adjustments

- Altering the number of winning positions

- Adjusting the Handicap of a player

- Withdrawing and re-instating a player's Handicap

- [Compensating for Course Difficulty](#)

- [Recording a General Play Score](#)

- [Compensating for Course Difficulty](#)

- [Recording a General Play Score](#)

15.11 Withdrawing and re-instating a player's Handicap

Only available when Handicapping is being done locally.

There may be circumstances where you need to withdraw a player's Handicap, for a period of time.

To withdraw a player's Handicap

1. Do one of the following:

- On the **Handicapping** menu, click **Withdraw/Reinstate Handicap**. Choose the Player and click **OK**.

- Right-click over the player entry in the All Members list and select **Withdraw/Reinstate Handicap** in the pop-up menu.

To reinstate a player's withdrawn Handicap

1. Do one of the following:

- On the **Handicapping** menu, click **Withdraw/Reinstate a Handicap**. Choose the Player and click **OK**.

- Right-click over the player entry in the All Members list and select **Withdraw/Reinstate Handicap** in the pop-up menu.

See Also

- About Local Handicapping

- How Tee Handicap and Strokes Received are calculated

- Allocating a player an initial Handicap

- Change the Handicapping Rules used

- The Configure Handicapping Rules Wizard

- Viewing Handicap Adjustments

- Altering the number of winning positions

- Adjusting the Handicap of a player

- Freezing the Handicap of a player

- Compensating for Course Difficulty

- Recording a General Play Score

15.12 Compensating for Course Difficulty

Where you may feel that, due to the difficulty of a course being played, some players may be disadvantaged, you may apply a Course Difficulty factor to player's Tee Handicap to compensate for this.

When you apply a compensation, each player's Handicap is increased by an additional proportion of their Handicap (defined as an additional percentage of their Handicap). This allows players with higher handicaps in the competition to receive additional Handicap strokes to cope with play over the difficult course.

Conversely, you may apply a percentage reduction in Handicap for especially easy courses (thereby reducing the strokes higher handicapped players will receive relative to the lower handicapped players).

HandicapMaster has a range of pre-set 'difficulty factors' for you to associate to each course, or you may apply any specific percentage value between -50% and +50%.

When a Course Difficulty factor is applied to a Course Scorecard, each player's Tee Handicap is calculated as

```
Tee Handicap = Round(Handicap + (Handicap x Course Difficulty%))
```

or if a "Reference Score minus Par" adjustment is active then each player's Tee Handicap is calculated as

```
Tee Handicap = Round(Handicap + (Handicap x Course Difficulty%) + (Reference
Score - Par))
```

See apply a Course Difficulty factor to a course scorecard.

See Also

- About Local Handicapping

- How Tee Handicap and Strokes Received are calculated

- Allocating a player an initial Handicap

- Change the Handicapping Rules used

- The Configure Handicapping Rules Wizard

- Viewing Handicap Adjustments

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- Adjusting the Handicap of a player

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- Withdrawing and re-instating a player's Handicap

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15.13 Issue or update the Handicap of an Away Player

Only available when Handicapping is being done locally.

On occasions, it is necessary to update HandicapMaster with the latest Handicap of a member when the member has their Home Club other than this club (they are an 'AWAY' member).

To allocate an AWAY member's Handicap

1.	On the **Handicapping** Menu, choose **Allocate an initial Handicap...** and select the applicable Member, or

2.	In the **Handicap** box, enter the player's initial handicap.

3.	In the **Date this Handicap starts in these records** box, enter the date from when the handicap is issued.

4.	Click **OK** to save this handicap.

To update an AWAY member's Strokes Received

1.	Do one of the following:

- On the **Handicapping** Menu, choose **Adjust Handicap** and select the applicable Member, or

- In the **AWAY Members** list click once to highlight the player, right click and select **Adjust Handicap**

2.	In the **New Handicap** box, enter the player's revised handicap.

3.	Click **OK** to save this adjustment.

15.14 Adjusted Gross Score

The "Adjusted Gross Score" is the player's gross score, adjusted to take account of any particularly bad holes.

Note: This is **NOT the player's Net Score**.

Initial Handicap Cards

For acceptable scores a "Par + 5" adjustment is applied to the gross score for each hole at which the player scores more than 5 strokes over Par, or does not complete the hole.

This adjustment is to limit the score for that hole to "Par + 5" as a maximum.

If the player does not play the hole, then a "Par + 5" value is used.

Example

Consider a player taking a 10 on a Par 3 hole..

For this player, a "Par + 5" adjustment limits the player's score to 8 on this hole.

The player's Adjusted Gross Score is calculated using 8 as the player's score for this hole.

Competition and General Play scores

For acceptable scores a Net Double Bogey adjustment is applied to the gross score for each hole at which the player scores more than a Net Par + 2, or does not complete the hole.

A net double bogey is equal to the lowest score on a hole for which the player would achieve zero Stableford points.

If the player does not play the hole, then a Net Par value is used.

Example

Consider a player with 15 Handicap scoring a gross 90, but taking a 10 on a Par 5 hole where the Stroke Index was 5.

For this player, a *Net Double Bogey* is (Par + Handicap Strokes + 2) = 5 + 1 + 2 = 8.

That is, an 8 is a double bogey after deduction of the handicap stroke this player is entitled to on this hole.

As the player scored 10 (two higher than the *Net Double Bogey*), his Gross score (for handicapping purposes only) is reduced by two strokes. His Adjusted Gross Score becomes 90 – 2 = 88.

Away Scores - If the adjusted gross score cannot be calculated from the information provided

When entering away scores manually if the adjusted gross score has not been provided or cannot be calculated then it is recommended that in this situation the Adjusted Gross Score is entered the same as the Gross Score (90 in our example above). *It should be noted, though, that the handicapping for this player may not be correct in this situation.*

Notes:

HandicapMaster will automatically apply the adjustment to player's scores for stroke play handicap counting competitions, where the full scorecard is entered.

15.15 Recording a General Play Score

Players with Handicaps may return extra scores (outside of competitions) to count as Handicap scores. These are known as "General Play Scores".

To record a General Play Score

1. Do one of the following:

    • On the **Handicapping** Menu, choose **Record General Play Score**, or

    • In the **Handicapping Tasks**, click **Record General Play Score**.

2. If requested, select the Player who has returned the General Play Score and click **OK**.

3. In the **Played On** box, enter the date when the scores were played. Choose the order the score is entered in the handicap record by selecting AM or PM.

4. Select the number of **Holes Played** for this score.

5. When available, select the **Format** of scoring (Regular Stroke Play or Stableford).

    Note: Some Golf Union regulations make it mandatory to use one format. In these cases, you will not be able to change the Format.

6. Click **Next >**.

7. In the **Course Played** box, choose which of the home courses was played (see Add additional courses to a club, if applicable).

    If the score was returned at another club that the player is a member of, select **Other - (Away Course)** instead.

    Note: The option to enter 'away' scores is not available in some regions due to Golf Union licence restrictions.

8. If the *Course Played* is a home course, select the **Tees** played.

9. If the *Course Played* is an away course,

    a) Click **Played At** button to identify the course,

    b) Do one of the following (as available);

        • Select the Course scorecard used in the **Course / Tees Played** box, or

        • In the **Reference Score** box, enter the score to use as the base for handicapping of the course, and In the **Course Difficulty** box, enter the Course Difficulty percentage handicap adjustment (or zero for no difficulty adjustment) for the course and in the **Course Par** box, enter the Par value for the course.

10. Click **OK**.

11. If this score is at a home course then enter the hole by hole scores, otherwise enter the score for the player.

Scores players have entered through Player Entry

You may allow players to record their own scores using the Player Entry system.

For further information, see

• Processing scores received through Player Entry

See Also

- [Undoing a General Play Score](#)

15.16 Record a Playing Note for a Player

"Playing Notes" are entries allowing notes and comments to be recorded for a player, for example, to maintain data for consideration during a General Play review.

To record a Playing Note for a Player

1.   Do one of the following:

   • On the **Handicapping** Menu, choose **Playing Note** and select the name of the Member, or

   • In the Members List, select the member and right-click. Click **Playing Note**.

2.   In the **Date in Record** box, enter the date you wish the note to be recorded against.

3.   In the **Comments** box, enter the note details.

4.   Do one of the following

   • Click **Save and More** if you wish to save the current note and then enter a note for another player, or

   • Click **OK** to save this note.

To list or print the recorded Playing Notes

1.   Do one of the following:

   • On the **Reports** Menu, choose **Handicapping Reports**, then **Playing Notes**, or

   • In the **Reports** place, select **Handicapping** tab, then **Playing Notes**.

2.   On the **File** menu select **Print Report.** The list will be converted to a report that can be printed or saved.

To Delete a Handicap Note

1.   In the **Handicapping** place, select **Playing Notes**.

2.   Do one of the following:

   • Highlight the note to be deleted and press the DELETE key on the keyboard.

   • Highlight the note to be deleted, right-click and select **UNDO**.

15.17 Plus Handicaps

Plus Handicaps are those handicaps where the player is required to add strokes to their score. Normally, players handicaps would reduce their score.

Mathematically, a plus Handicap is represented by negative numbers, but the golfing authorities refer to these as *Plus Handicaps* as they add strokes to the score, and require them to be written with the 'Plus' Symbol. For example, a "plus one" handicap is written +1 (although it is processed as -1 value).

HandicapMaster will display these handicaps using the plus symbol.

How to enter a Plus Handicap value into HandicapMaster

HandicapMaster will offer you a list of possible Handicap values. Numbers below zero will be displayed using the Plus symbol such as '+1.2'.

You may overtype these numbers using either the '+' or the '-' prefix to represent a Plus Handicap. HandicapMaster will convert the onscreen representation to use the '+' symbol when the number has been entered (even if the - prefix is used instead).

15.18 Enter an Away score for a Player

Only available when Handicapping is being done locally.

Players must return Handicap Qualifying scores from competitions played at clubs other than their Home Club. These are known as 'Away' competition scores.

Players are required to report these scores to their Home Club. This may be done manually or in some regions may be submitted electronically.

Important Note: The option to enter 'away' scores is not available in some regions due to Golf Union licence restrictions.

To manually record a score returned from another club

1.   Do one of the following:

- On the **Handicapping** Menu, choose **Record Away Scores**, or

- In the **Handicapping Tasks, Record Away Scores**.

2.   In the **Competition Name** box, enter the name of the Competition.

3.   In the **Played On** box, enter the date when the qualifying score was returned. Choose the order the score is entered in the handicap record by selecting AM or PM.

4.   Identify the round of the competition and how many rounds in total made up this competition, by selecting the appropriate values in **Round x of y** boxes.

5.   In the **Format** boxes, choose the number of holes played and appropriate format for the competition (Stroke Play, Stableford or Par (Bogey, vPar)).

6.   Click the **Played at...** button to select the Club where the competition was played.

7.   Enter the **Handicapping** information into the Handicapping section:

- Select the handicapping status of the Competition in the **Competition Handicapping Status** box.

- Do one of the following (as available);

  - Select the Course scorecard used in the **Course / Tees Played** box, or

  - In the **Reference Score** box, enter the score to use as the base for handicapping of the course, and In the **Course Difficulty** box, enter the Course Difficulty percentage handicap adjustment (or zero for no difficulty adjustment) for the course and in the **Course Par** box, enter the Par value for the course.

   Click NEXT

8.   For each player who has returned a Score in this Away Competition:

- Click **Add Player...** button

- Select the Player from the list

9.   For Regular Stroke Play

- Enter the Player's **Gross Score (Strokes)** and **Adjusted Gross**.

10.   For Stableford

- Enter the Player's **Tee Handicap** and **Score (Points)**

11. For Par/Bogey

  - Enter the Player's **Tee Handicap** and **Score Par Result**.

To remove a Player entered in error

1. Select the Player in the Scores Grid

2. Click **Remove** button

15.19 Handicapping of Competitions played over less than 18 holes

15.19.1 How number of Strokes Received is calculated

Handicapping based on 18-hole Handicaps

Where the number of holes being played in a competition is less than 18 holes, HandicapMaster will base the number of strokes a player or team receives on each player's "18 hole" handicap (I.e. their normal Tee Handicap).

The player's Tee Handicap is then scaled to the number of holes being played, using this formula:

(18 hole Tee Handicap) x (Proportion of 18 hole course being played)

That is, for example in a 15-hole competition, the player's 18-hole Tee Handicap is multiplied by 15/18ths.

The competition allowance is then applied to this adjusted Tee Handicap to calculate the player's Strokes Received.

An exception to this is when the scorecard is a 9-hole handicap counting score (see below).

The minimum number of holes played may be a single hole.

9-Hole Handicap Competitions

For 9-hole competitions that count for Handicapping, HandicapMaster will use the formula:

((Handicap / 2) x (Course Difficulty)) + (9-hole Reference Score - 9-Hole Par)

Limits set on number of strokes that may be received

If a limit is set on the number of strokes that may be received by any player or team, this limit is applied **after** calculating the strokes to be received.

In our two examples above, the limit would be applied **after** calculating either ½ of 18 hole Handicap (example 1) or after calculating 7/12ths of 18 hole handicap (example 2).

See Also

- Stroke Index allocation and where Handicap Strokes are received

15.19.2 Stroke Index allocation and where Handicap Strokes are received

Where Strokes are taken on the Scorecard

When less than 18 holes are being played, then some Stroke Indexes on the Scorecard will not come into play. For example, for a 9 hole competition, it may be that only the odd numbered Stroke Indexes or only the even numbered Stroke Indexes will come into play.

When deciding on which holes a player will receive strokes, HandicapMaster will refer to only the Stroke Indexes being played and allocate the strokes received to the appropriate holes.

For example, suppose a 9 hole competition is being played over holes with the following Stroke Indexes:

3, 4, 6, 10, 11, 13, 15, 16, 18

If a player is due to receive 5 strokes, these will be allocated to the 5 holes with the lowest stroke indexes (I.e. holes with indexes 3, 4, 6, 10 and 11 in this example).

Likewise, if a player is due to receive 12 strokes he will be allocated 2 strokes on the holes with the three lowest Stroke Indexes, and one stroke on the rest.

Players with "Plus" handicaps will give strokes to the course starting with the holes with the highest Stroke Indexes being played.

Allocation of Stroke Indexes

In the example where the holes with the following Stroke Indexes are being played...

3, 4, 6, 10, 11, 13, 15, 16, 18

...it would be possible to re-allocate the Indexes as 1, 2, 3, 4, 5, 6, 7, 8 and 9.

Providing index 1 is allocated to the same hole as the lowest Stroke Index on the original numbers (3 in this example), 2 to the same hole as the second lowest original Stroke Index, etc, then this will not make any difference.

In this situation, it's optional whether to allocate new Stroke Indexes for the "short" course being played, or whether to stick with the existing Stroke Indexes for the course, as printed on the 18 hole Scorecard.

Note:

You may elect for HandicapMaster to automatically renumber the Stroke Indexes in play as 1, 2, 3, .. etc. To do this, amend the Competition Template and tick the **Use Stroke Indexes of 1 to *n* for holes in play** box in the template.

See Also

- How number of Strokes Received is calculated

Chapter

16

Bookings

16 Bookings

16.1 Competition Entry

16.1.1 Introduction

The Bookings facility is available in the Gold editions of HandicapMaster

The *Bookings* facility allows players to book into future opened competitions (automating the Competition Entry sheet on the Clubhouse wall).

The booking list can, if required, be incorporated into a start list once bookings for a competition has closed.

You may allow bookings to be accepted through the Player Entry system and/or Master Scoreboard web site.

A Bookings Template allows you to set the format of the bookings list (and use this for future competitions).

You may specify:

- The block of tee times available for booking,
- Unavailable tee times from within this block, and
- The time frame within which bookings may be accepted.

Players may book:

- a specific tee time or
- a place within a block from which a specific tee time will then be drawn.

Collecting Bookings for a Competition

Bookings may be collected through the HandicapMaster Player Entry system, or Master Scoreboard web site, or through external Booking Systems.

If you have an account with BRS Golf, MyTeeTimes, eTeeSheet or Tee Times 4 You you may download competition bookings from the external booking service onto Start Sheets. This option turns off bookings in HandicapMaster, however.

A broadband internet connection between HandicapMaster and Master Scoreboard web site is required, along with an account on Master Scoreboard.

If Bookings are being collected through the HandicapMaster Player Entry system, bookings may be made by a club official or by the player themselves using the score entry screen Access is identical as for score entry, i.e. either by Name or PIN. In addition, users with direct access to the computer can book via the standard HandicapMaster windows.

The booking entry screen may be configured to show names of players already booked in, or else as a slot that is taken, without identification of player.

The Score entry/bookings screen offers a choice of, either or both, score entry, or booking into a future opened competition. If the latter is selected, then future opened competitions, available for advance booking, are displayed.

The Bookings facility is available in the Gold editions of HandicapMaster

See Global Options for settings related to how the bookings system shall operate.

Contents

- Bookings Templates

- Prepare a Competition to receive Bookings

- Opens Competitions; Players paying online to enter competition

- Manage Bookings within HandicapMaster

- Manage Bookings using Player Entry System

- Enable the Bookings Function in Player Entry System

- Online Bookings

- View a History of the Bookings received

- Cancellation of Bookings

- Reserves

- Configure Booking options

See Also

- Import Competition Bookings from BRS Golf, MyTeeTime, eTee Sheet or Tee Times 4 You

16.1.2   Bookings Templates

16.1.2.1   Introduction to Bookings Templates

The Bookings facility is available in the Gold editions of HandicapMaster

'Setting Up' of a Booking Template requires you to identify certain characteristics of how players will book into a competition (such as will they choose their own Tee Time?).

Once a Booking Template has been set up, the format is held on the database for future reference. If you choose the Template at a later date, the same settings will be used again; providing a level of consistency when running re-occurring competitions such as Medals.

You will need at least one Bookings Template before you may configure HandicapMaster to receive bookings into a competition.

Contents

- Create a Bookings Template

- Modify a Bookings Template

- Delete a Bookings Template

- The Bookings Template Wizard

See Also

- Prepare a Competition to receive Bookings

- Opens Competitions; Players paying online to enter competition

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- [Manage Bookings within HandicapMaster](#)

- [Manage Bookings using Player Entry System](#)

- [Enable the Bookings Function in Player Entry System](#)

- [Online Bookings](#)

- [View a History of the Bookings received](#)

- [Cancellation of Bookings](#)

- [Reserves](#)

- [Configure Booking options](#)

16.1.2.2 Create a Bookings Template

The Bookings facility is available in the Gold editions of HandicapMaster

To create a new Bookings Template

1. Do one of the following:

    - On the **Competitions** drop-down menu, click **Set up a Bookings Template**, then **New**.

    - On the left hand task pane, select **Booking**s place. On the right hand pane, double-click **Bookings Templates (Competitions)**. In the left hand column, click **Create a new Template** task.

2. Select the template Information using the [Bookings Template Wizard](#) provided.

16.1.2.3 Modify a Bookings Template

The Bookings facility is available in the Gold editions of HandicapMaster

To modify the details of an existing Bookings Template

1. Do one of the following:

    - On the **Competitions** drop-down menu, click **Set up a Bookings Template** and select a Template from the list displayed.

    - On the left hand task pane, select **Booking**s place. On the right hand pane, double-click **Bookings Templates (Competitions)**. Select a Template and press ENTER Key.

2. Modify the template Information using the [Bookings Template Wizard](#) provided.

Note

When a competition is opened through the [Open a New Competition](#) wizard, the Bookings Template properties applied to that competition cannot be varied by subsequently modifying the template.

The Booking properties applied to an opened (or undone closed competition) can be modified through the **Config** button on the [Enter Scores Toolbar](#).

16.1.2.4 Delete a Bookings Template

The Bookings facility is available in the Gold editions of HandicapMaster

To delete an existing Bookings Template

1. On the left hand task pane, select **Bookings** place.

2. On the right hand pane, double-click **Bookings Templates (Competitions)**.

3. Do one of the following:

   - Select a Template and press DELETE Key, or

   - Right-click over a selected Template, then select **Delete**.

16.1.2.5 The Bookings Template Wizard

The Bookings facility is available in the Gold editions of HandicapMaster

The Bookings Templates Wizard steps through the stages of setting up a template for Bookings.

How will Players Book In?

1. In the **Name** box, enter a name for this Template. It is suggested that the name should be descriptive of the type of Bookings being configured, so that the correct template may more easily be chosen when configuring a competition for Bookings.

2. In the **Players may Book** section, choose one of the following:

   - **A Tee Time**
     Players will be asked to choose the Tee time they wish to book.

   - **A place in a Block of Times**
     Where players enter into a block of tee times, this allows the organising committee to draw tee times (e.g. draw partners) once the bookings has closed.

   - **A place in a Multiple Tee ('Shotgun') Start**.
     A *Shotgun Start* is where play starts from multiple tees at the same time. Players will book into a single list (and a draw will decide their partners), or into Groups.

3. Click **Next**

Tee Times

Players booking a Tee Time or into a Block of Times

4. Select the Tee the players will start from in the **Games Start from** list and select the first and last tee times available for this competition.

5. In the **Interval** list, select the minutes between each Tee time.

6. In the **Players per Tee Time** list, select whether play will be in ones, twos, threes or fours.

7. Tick the **Use Two Tees** box if a second Tee is to be used. For example, where play will be from the 1st and 10th Tees.

   If a second Tee is to be used, select the **Second Tee** the players will start from and select the first and last tee times available for this Tee.

8. If players are to enter in Blocks of times, select either the number of blocks to offer for players to book in to, or select how many tee times will make up each block (and HandicapMaster will automatically calculate the number of blocks required).

9. Click **Next**

Players booking into a Multiple Tee ('Shotgun') Start

10. In the **Play Starts at**, enter the time when all games will tee off.

11. In the **Number of Groups** box, enter the maximum number of groups that will be teeing off.

12. In the **Players per Group** list, select whether play will be in ones, twos, threes or fours.

13. Tick the **Players choose which group to play in** if players can decide their partners for the shotgun start.

14. Click **Next**.

<div style="border:1px solid #5b9bd5; background:#dbe9f5; padding:4px">

Availability to book into the competition

</div>

When players may book section

15. In the **Bookings to be accepted ...** boxes, select the time and date when bookings is to be opened and the time and date when bookings is to close for this competition.

Where players may book section

16. Tick **In the Clubhouse** box if you wish players to be able to book through Player Entry.

17. Tick **Online** if you wish players to be able to book through the Master Scoreboard web site.

Which players may book section

18. Tick the **Members** option if booking into this competition is to be limited to members only, and visitors are not eligible to enter.

19. Tick the **Members, booking Members and/or Visitors ('Members Invitational' / 'Semi-Open')** option if both members and visitors are eligible to play in the competition, but only members may place the bookings.

20. Tick the **Members and Visitors** option if both members and visitors may book into the competition.

Note: The **Members, booking Members and/or Visitors ('Members Invitational' / 'Semi-Open')** and **Members or Visitors** options are only available when the **Online** option is selected and *not* the **In the Clubhouse** option.

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Options

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Selected options will be available depending upon your previous selections...

21. Tick the **Allow players without Handicaps** box if you wish to allow players who do not have a Handicap to be able to book into the competition.

22. Tick the **Show names of players already booked In** box if you wish players to be able to see which other players have booked into the competition.

23. If booking into blocks of times, tick the **Show Tee times associated with each Block** box if you wish to define blocks as groups of times (for example, "9.00 to 9.50", "10.00 to 10:50", etc) for players to select from.

24. If bookings are being received on Master Scoreboard web site and through Player Entry, and you wish players to be able to book through Player Entry ahead of being able to book online, tick the

Delay accepting bookings via web site by... box and set a delay.

25.Tick the **Operate a Reserves list when booking sheet is full (singles competitions)** box if you wish to allow players to add their names to a reserves list when the booking sheet is full. In this situation, when a player cancels a booking, or a slot becomes available for another reason, the player at the top of the reserves list will automatically be promoted into the competition. The player at the top of the list will be the player who has been on the reserves list for the longest time. Only applicable for Members, Singles competitions.

26.Where the competition is not an "open" with payment at time of entry, select the number of players that may be included when a player places a booking. In the **When Booking, Players Book** section ...

- Select **Themselves only** when you wish players to book singularly, whether a singles or team competition.

- Select **Themselves and all partners required to make up a team** when you wish players to always book the correct number of players in team competitions to make up a team (2 for pairs competitions, 3 for 3-player competitions, etc). For singles competitions, this will effectively operate the same as *Themselves only* option.

- Select **Any number of players into the same Tee Time** when you wish to allow players a free choice of how many 'friends' they may book into the same Tee time as themselves. This option is not available when booking into a block of times, or 'shotgun' start.

27.If players are being asked to pay online when booking, tick the **Visitors booking online must supply National ID's** box if you wish all players to provide a national identification number when booking.

28.In the **Reserve Times for the competition in General Bookings schedules that use Facility** list, select the facility these competitions will be using (if you are using General Bookings). This will have the effect of automatically reserving times in the General Bookings for this competition.

29.Click **Next**

Discount Schemes

*Discount Schemes are only available for Open Competition booking (i.e. when the **Players to Pay by Debit/Credit Card when booking** option is selected).*

27.If you wish customers to be able to checkout using discounts (e.g. discount cards or vouchers such as County Card, 2-For-1 schemes, etc.), tick **Discount Cards and Vouchers accepted** box. Then tick the box alongside any scheme that you wish customers to be able to use when booking schedules created with this template

Note: You are limited to a maximum of four schemes per template.

28.If you wish to modify the list of schemes, click **Configure Discount Schemes** button.

Tee Availability

29.If you have a section of tee times that are not available for this competition, un-tick the box alongside the times displayed. This will prevent these times from being used for Bookings.

30.Click **Next**

Public Notice

31.If you are using the Master Scoreboard service, you may display a message on the booking page for this competition on the web site. Enter the message in the **Web Site Public Notice** box.
Note: You may emphasise sections of the message by wrapping the emphasised text with '' and ''. For example. to display the following message "Payment for entry to this competition **must be paid** on the day of the competition." enter "Payment for entry to this competition must be paid

on the day of the competition."

32.Click **Next** then **Finish**

16.1.3   Prepare a Competition to receive Bookings

The Bookings facility is available in the Gold editions of HandicapMaster

To configure a Competition to receive Bookings

1. If you do not already have a Bookings Template suitable for this competition, create a Bookings Template.

2. Do one of the following:

   - When Opening a New Competition, tick the **Use Bookings** box and then choose the required Bookings Template, or

   - If the competition has already been opened, either

        i. Highlight the competition in the Opened Competitions list and select **Bookings** in the Competition Tasks.

     or

        a. Select **Enter Scores** and choose the applicable competition.

        b. Click the **Config** button on the Enter Scores Toolbar.

        c. Click the **Bookings** tab.

        d. Click **Configure Bookings** button.

3. Choose the required Bookings Template.

See Also

- Bookings Templates

- Prepare a Competition to receive Bookings

- Opens Competitions; Players paying online to enter competition

- Manage Bookings within HandicapMaster

- Manage Bookings using Player Entry System

- Enable the Bookings Function in Player Entry System

- Online Bookings

- View a History of the Bookings received

- Cancellation of Bookings

- Reserves

- Configure Booking options

16.1.4 Modify Booking Arrangements

The Bookings facility is available in the Gold editions of HandicapMaster

To modify booking arrangements already configured for a competition

1. Do one of the following:

- Highlight the competition in the Opened Competitions list and select **Bookings Received** in the Competition Tasks. Click **Re-configure Bookings Arrangements** in the Bookings Tasks

- On the left hand task pane, select **Booking**s place. On the right hand pane, double-click **Competitions**. Double-click the applicable competition in the list. Click **Re-configure Bookings Arrangements** in the Bookings Tasks.

- Select **Enter Scores** and choose the applicable competition. Click the **Config** button on the Enter Scores Toolbar. Click the **Bookings** tab. Click **Amend Bookings** button.

2. Modify the Bookings arrangements using the Bookings Wizard.

To add additional Tee Times, Blocks or Groups to the booking sheet

If you need to add additional Tee times, Blocks or Groups to an existing bookings arrangement, do the following:

1. Do one of the following:

- On the left hand task pane, select **Booking**s place. On the right hand pane, double-click **Competitions**. Double-click the applicable competition in the list. Click **Re-configure Bookings Arrangements** in the Bookings Tasks.

- Select **Enter Scores** and choose the applicable competition. Click the **Config** button on the Enter Scores Toolbar. Click the **Bookings** tab. Click **Amend Bookings** button.

2. In the Bookings Wizard, click **Next**, then **Next** again

3. On the Available Tee Times page, click **Add Time** or **Add Block** or **Add Group** button.

- Click **Before First Tee Time** or **Before First Block** to add to before the current set of Times/ Blocks, or

- Click **After Last Tee Time or After Last Block** to add to the end of the current set of Times/ Blocks.

Repeat if more than one additional Tee time is required.

4. Complete the wizard to apply the additional Tee time(s).

To change the number of places available for a tee time

If you wish to add (or reduce) the number of places available to book for a specific tee time, do the following:

2. Do one of the following:

- On the left hand task pane, select **Booking**s place. On the right hand pane, double-click **Competitions**. Double-click the applicable competition in the list. Click **Re-configure Bookings Arrangements** in the Bookings Tasks.

- Select **Enter Scores** and choose the applicable competition. Click the **Config** button on the Enter Scores Toolbar. Click the **Bookings** tab. Click **Amend Bookings** button.

2. In the Bookings Wizard, click **Next**, then **Next** again

3. On the Available Tee Times page, highlight a Tee Time in the list, then click the **Places** button.

- Click **Increase Number of Places for Tee Time** to add to the number of places for the selected tee time, or

- Click **Reduce Number of Places for Tee Time** to reduce the number of places for the selected tee time

Repeat if more than one additional Tee time is required.

4. Complete the wizard to apply the additional Tee time(s).

Notes:

- The minimum number of places that can be offered is 1. The maximum number of places is 4.

- The facility to amend the number of places on offer is only available when the arrangements are configured for players to book by selecting a tee time.

See Also

- Bookings Templates

- Prepare a Competition to receive Bookings

- Opens Competitions; Players paying online to enter competition

- Manage Bookings within HandicapMaster

- Manage Bookings using Player Entry System

- Enable the Bookings Function in Player Entry System

- Online Bookings

- View a History of the Bookings received

- Cancellation of Bookings

- Reserves

- Configure Booking options

16.1.5 Cancel Booking Arrangements

The Bookings facility is available in the Gold editions of HandicapMaster

To cancel booking into a competition (cancel all bookings arrangements for the competition)

1. To cancel taking bookings into a competition (*deleting any bookings already received*), do one of the following

- On the left hand task pane, select **Booking**s place. On the right hand pane, double-click **Competitions**. Double-click the applicable competition in the list. Click **Cancel Bookings Arrangements** in the Bookings Tasks.

- Select **Enter Scores** and choose the applicable competition. Click the **Config** button on the Enter Scores Toolbar. Click the **Bookings** tab. Click **Cancel Bookings** button.

- [Bookings Templates](#)

- [Prepare a Competition to receive Bookings](#)

- [Opens Competitions; Players paying online to enter competition](#)

- [Manage Bookings within HandicapMaster](#)

- [Manage Bookings using Player Entry System](#)

- [Enable the Bookings Function in Player Entry System](#)

- [Online Bookings](#)

- [View a History of the Bookings received](#)

- [Cancellation of Bookings](#)

- [Reserves](#)

- [Configure Booking options](#)

16.1.6 The Bookings Wizard

The Bookings facility is available in the Gold editions of HandicapMaster

The Bookings Wizard steps through the stages of modifying bookings arrangements for a competition.

Availability to book into the competition

When players may book section

1. In the **Bookings to be accepted ...** boxes, select the time and date when bookings is to be opened and the time and date when bookings is to close for this competition.

Where players may book section

2. Tick **In the Clubhouse** box if you wish players to be able to book through Player Entry.

3. Tick **Online** if you wish players to be able to book through the Master Scoreboard web site.

Which players may book section

4. Tick the **Members** option if booking into this competition is to be limited to members only, and visitors are not eligible to enter.

5. Tick the **Members, booking Members and/or Visitors ('Members Invitational' / 'Semi-Open')** option if both members and visitors are eligible to play in the competition, but only members may place the bookings.

6. Tick the **Members and Visitors** option if both members and visitors may book into the competition.

   Note: The **Members, booking Members and/or Visitors ('Members Invitational' / 'Semi-Open')** and **Members and Visitors** options are only available when the **Online** option is selected and *not* the **In the Clubhouse** option.

Options

Selected options will be available depending upon your previous selections...

7. Tick the **Allow players without Handicaps** box if you wish to allow players who do not have a Handicap to be able to book into the competition.

8. Tick the **Show names of players already booked In** box if you wish players to be able to see which other players have booked into the competition.

9. If booking into blocks of times, tick the **Show Tee times associated with each Block** box if you wish to define blocks as groups of times (for example, "9.00 to 9.50", "10.00 to 10:50", etc) for players to select from.

10. If bookings are being received on Master Scoreboard web site and through Player Entry, and you wish players to be able to book through Player Entry ahead of being able to book online, tick the **Delay accepting bookings via web site by...** box and set a delay.

11. Tick the **Operate a Reserves list when booking sheet is full (singles competitions)** box if you wish to allow players to add their names to a reserves list when the booking sheet is full. In this situation, when a player cancels a booking, or a slot becomes available for another reason, the player at the top of the reserves list will automatically be promoted into the competition. The player at the top of the list will be the player who has been on the reserves list for the longest time. Only applicable for Members, Singles competitions.

12. Where the competition is not an "open" with payment at time of entry, select the number of players that may be included when a player places a booking. In the **When Booking, Players Book** section ...

   i. Select **Themselves only** when you wish players to book singularly, whether a singles or team competition.

   ii. Select **Themselves and all partners required to make up a team** when you wish players to always book the correct number of players in team competitions to make up a team (2 for pairs competitions, 3 for 3-player competitions, etc). For singles competitions, this will effectively operate the same as *Themselves only* option.

   iii. Select **Any number of players into the same Tee Time** when you wish to allow players a free choice of how many 'friends' they may book into the same Tee time as themselves. This option is not available when booking into a block of times, or 'shotgun' start.

13. If players are being asked to pay online when booking, tick the **Visitors booking online must supply National ID's** box if you wish all players to provide a national identification number when booking.

Discount Schemes

*Discount Schemes are only available for Open Competition booking (i.e. when the **This is a club 'Open'; Players must Pay when booking** option is selected).*

14. If you wish customers to be able to checkout using discounts (e.g. discount cards or vouchers such as County Card, 2-For-1 schemes, etc.), tick **Discount Cards and Vouchers accepted** box. Then tick the box alongside any scheme that you wish customers to be able to use when booking schedules created with this template

   Note: You are limited to a maximum of twelve schemes per template.

15. If you wish to [modify the list of schemes](), click **Configure Discount Schemes** button.

Tee Availability

15. If you have a section of tee times that are not available for this competition, un-tick the box alongside the times displayed. This will prevent these times from being used for Bookings.

16. Click **Next**

Public Notice

17. If you are using the Master Scoreboard service, you may display a message on the booking page for this competition on the web site. Enter the message in the **Web Site Public Notice** box.
Note: You may emphasise sections of the message by wrapping the emphasised text with '' and ''. For example. to display the following message "Payment for entry to this competition **must be paid** on the day of the competition." enter "Payment for entry to this competition must be paid on the day of the competition."

18. Click **Next** then **Finish**

See Also

- [Bookings Templates](#)

- [Prepare a Competition to receive Bookings](#)

- [Opens Competitions; Players paying online to enter competition](#)

- [Manage Bookings within HandicapMaster](#)

- [Manage Bookings using Player Entry System](#)

- [Enable the Bookings Function in Player Entry System](#)

- [Online Bookings](#)

- [View a History of the Bookings received](#)

- [Cancellation of Bookings](#)

- [Reserves](#)

- [Configure Booking options](#)

16.1.7 Opens Competitions; Players paying online to enter competition

The Bookings facility is available in the Gold editions of HandicapMaster

You may use the HandicapMaster bookings facility to offer players (including visitors) the option to book into future club "Opens" online.

Where you have configured the system to take payments online through Stripe, you may extend this with payment taken online at the time the player books. This may also be used to require members to Pay online to book Members-only competitions.

To do this, you will need

1. To configure HandicapMaster to [operate with the Stripe payment system](#),

2. One or more bookings templates set for **Online** booking only, with either option **Members, booking Members and/or Visitors** or **Members and Visitors** ticked.

3. An entry fee configured to the competition.

4. Provide a link to a Master Scoreboard web page for Visitors to book.

Member's Invitational Competitions (e.g. 'Semi-Opens')

If the competition is a Members' Invitational competition (often called a 'Semi-Open') where only members can place the booking, select **Members, booking Members and/or Visitors** option.

To view the web page address for Visitor to enter the competitions online, view the link in the Settings window.

1. Do one of the following:

- On the left hand task pane, select **Bookings** place. On the right hand pane, double-click **Settings**.

- On the **File** menu, click **Options**. Select the **Bookings** tab and then click **Configure Bookings** button.

2. Click the **Open**s tab.

The links to the Visitor booking page (and also a page to show competition results) is displayed.

See Also

- Bookings Templates

- Prepare a Competition to receive Bookings

- Manage Bookings within HandicapMaster

- Manage Bookings using Player Entry System

- Enable the Bookings Function in Player Entry System

- Online Bookings

- View a History of the Bookings received

- Cancellation of Bookings

- Reserves

- Configure Booking options

16.1.8 Manage Bookings within HandicapMaster

The Bookings facility is available in the Gold editions of HandicapMaster

To Book a specific tee time or a slot within a block.

Select an Opened Competition:

1. On the Left Hand Task Pane, select **Bookings** Place.

2. Select **Competitions**.

3. Highlight the required competition with a single click.

Configure Booking Criteria:

1. If not previously configured, prepare the competition to receive bookings.

Book a Player into the Competition

Once the booking criteria for a competition have been completed the bookings function on the left hand pane has a new function.

1. Click on **Bookings Received** in the Bookings or Competitions Tasks (in the left hand pane). The right hand pane shows the times available for booking, including the [Bookings Toolbar](#).

2. Click on a specific time or slot then either

   - click **Book Player In** from the Bookings tasks menu, or

   - double-click on the selected line or cell, or

   - start typing the surname of the player to be booked.

     The list of players is displayed. The list will be restricted to the names of the players who are eligible to enter the competition only.

3. Choose the Player and click **OK**, or double-click the Player name.

To move a player's booking

1. Click on **Bookings Received** in the Bookings Tasks (in the left hand pane). The right hand pane shows the times available for booking.

2. Click on a specific time or slot then click **Book Player In** from the competition tasks menu. Alternatively double-click on the selected tee time.

The list of players is displayed. The list will be restricted to the names of the players who are eligible to enter the competition only.

3. Choose the Player and then either click **OK**, or double-click the Players name

4. If the player is already booked in then you will be asked to confirm that you wish the player's booking to be moved.

To remove player from bookings list.

1. On the Left Hand Task Pane, select **Bookings** Place

2. Select **Competitions**

3. Highlight the required competition with a single click.

4. Click on **Bookings Received** in the Bookings Tasks (in the left hand pane). The right hand pane shows the times available for booking and the players booked into the Competition.

5. Select player. then either

   - click **Remove Player** in the left hand pane, or

   - right-click over the Player's name and select **Remove Player from Competition**, or

   - press the DELETE key on the keyboard.

See Also

- [Bookings Templates](#)

- [Prepare a Competition to receive Bookings](#)

- [Opens Competitions; Players paying online to enter competition](#)

- [Manage Bookings using Player Entry System](#)

- [Enable the Bookings Function in Player Entry System](#)

- Online Bookings

- View a History of the Bookings received

- Cancellation of Bookings

- Reserves

- Configure Booking options

16.1.9 The Bookings Toolbar

The Bookings facility is available in the Gold editions of HandicapMaster

When the Bookings list for a future competition is requested, the following Toolbar is displayed above the bookings:
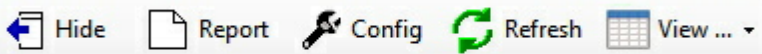
When displaying a Reserves List for a competition, the following Toolbar is displayed:
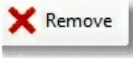
Bookings Buttons

On the bar are the buttons as follows:

Button	Type	Description
	Hide / Show	Hide or Show the left hand pane.
	Report	Display a printable report of the bookings received.
	Config	Re-configure the arrangements for players to book into this competition.
	Refresh	Refresh the screen, updating the screen to display the latest bookings received.
	View	Switch the layout of the display between *List* (a players shown in a list, along with the date and time when they booked in) or *Sheet* (a display of the bookings in a "spread sheet" style layout) or *Reserves List* (a display of all players on a reserves list when a booking sheet is full).

Reserves Buttons

Button	Type	Description
➕ Add	Add	Add a player to the reserves list
✖ Remove	Remove	Remove a player from the reserves list
🔄	Refresh	Refresh the screen, updating the screen to display the latest bookings received.
🔲 View ... ▾	View	Switch the layout of the display between *List* (a players shown in a list, along with the date and time when they booked in) or *Sheet* (a display of the bookings in a "spread sheet" style layout) or *Reserves List* (a display of all players on a reserves list when a booking sheet is full).

16.1.10 Manage Bookings using Player Entry System

The Bookings facility is available in the Gold editions of HandicapMaster

To Book a specific tee time or a slot within a block.

1. Enable the Bookings Function in Player Entry System with appropriate player entry setting as above. The option "**Book a Future Competition"** will be made available on the first screen in the Player Entry system.

2. Prepare competitions to receive Bookings using the Bookings wizard.

Players will be able to select any available competition and book into a time slot or into a block of times.

To allow Players to view the Bookings they have made through Player Entry

Enable the View Information service in the Player Entry system, and select the **My Golf** service. Up to the next four forthcoming bookings a player has made will be displayed on the **My Golf** screen.

See Also

- Bookings Templates
- Prepare a Competition to receive Bookings
- Opens Competitions; Players paying online to enter competition
- Manage Bookings within HandicapMaster
- Enable the Bookings Function in Player Entry System
- Online Bookings
- View a History of the Bookings received
- Cancellation of Bookings

- Reserves

- Configure Booking options

16.1.11 Online Bookings

The Bookings facility is available in the Gold editions of HandicapMaster

To offer Members the option to book competitions online

You may offer members the option to book online through the Master Scoreboard web site. This may be in place of, or in association with, taking bookings through the Player Entry system.

To offer booking into competitions online you will need to

1. Request an account on Master Scoreboard

2. Amend the Master Scoreboard account through the Control Panel so that each member logs in individually into Master Scoreboard

3. Prepare competitions to receive Bookings using the Bookings wizard (including setting the bookings to be accepted online)

Players will be able to select any available competition and book into a time slot or into a block of times.

See Also

- Bookings Templates

- Prepare a Competition to receive Bookings

- Opens Competitions; Players paying online to enter competition

- Manage Bookings within HandicapMaster

- Manage Bookings using Player Entry System

- Enable the Bookings Function in Player Entry System

- View a History of the Bookings received

- Cancellation of Bookings

- Reserves

- Configure Booking options

16.1.12 Enable the Bookings Function in Player Entry System

The Bookings facility is available in the Gold editions of HandicapMaster

To Enable the Bookings Function in the Player Entry System

1. Configure Player Entry using the Configure Player Entry Wizard.

   - Tick the **Allow Players to Cancel their Bookings in Future Competitions** box to allow Players to be able to cancel bookings through the Player Entry system.

- Tick the **Book into Future Competitions** box to turn on Bookings in the Player Entry system.

- Tick the **View Information** service box, then **My Bookings** box to allow players the option to check the bookings they have made into future competitions.

See Also

- Bookings Templates

- Prepare a Competition to receive Bookings

- Opens Competitions; Players paying online to enter competition

- Manage Bookings within HandicapMaster

- Manage Bookings using Player Entry System

- Online Bookings

- View a History of the Bookings received

- Cancellation of Bookings

- Reserves

- Configure Booking options

16.1.13 View History of Bookings Received

The Bookings facility is available in the Gold editions of HandicapMaster

You may view the history of bookings received into a chosen competition, This report shows who booked in (by whom), when and how they booked in.

To view the history of bookings received into a competition

If the competition is currently open:

1. On the Left Hand Task Pane, select **Bookings** Place

2. Select **Competitions**

3. Right-click over the required competition and select **Report (History of Bookings)**

Alternatively,

1. On the **Reports** menu, select **Bookings Reports**, then click **History of Bookings (Opened competition)**

If the competition has been closed:

1. On the Left Hand Task Pane, select **Competitions** Place

2. Double-click **Closed Competitions**

3. Right-click over the required competition and select **Report (History of Bookings)**

See Also

- Bookings Templates

- [Prepare a Competition to receive Bookings](#)

- [Opens Competitions: Players paying online to enter competition](#)

- [Manage Bookings within HandicapMaster](#)

- [Manage Bookings using Player Entry System](#)

- [Enable the Bookings Function in Player Entry System](#)

- [Online Bookings](#)

- [Cancellation of Bookings](#)

- [Reserves](#)

- [Configure Booking options](#)

16.1.14 Cancellation of Bookings

The Bookings facility is available in the Gold editions of HandicapMaster

If the Bookings is configured to allow players to cancel their bookings into competitions, the following policy will be applied to requests for cancellations:

Cancellation policy

1. Players cancelling their own booking

For players to be able to request removal from a competition booking, the setting in FILE->OPTIONS->BOOKING tab must be turned on. Then...

a) Players can request their booking cancelled through Player Entry or Master Scoreboard (as applicable).

b) If a player requests a cancellation in a team competition, then the whole team entry will be cancelled (partners and all).

c) Players cannot cancel their booking if another player booked them in (as a partner for a team). I.e. only the player who originated the booking may affect the cancellation.

2. Administrators cancelling a player's booking

This must be performed through the main HandicapMaster program (not through Player Entry and not via MasterScoreboard.co.uk web site).

Administrators may remove a single player, even when this player was booked as part of a team.

See Also

- [Bookings Templates](#)

- [Prepare a Competition to receive Bookings](#)

- [Opens Competitions: Players paying online to enter competition](#)

- [Manage Bookings within HandicapMaster](#)

- [Manage Bookings using Player Entry System](#)

- [Enable the Bookings Function in Player Entry System](#)

- [Online Bookings](#)

- [View a History of the Bookings received](#)

- [Reserves](#)

- [Configure Booking options](#)

16.1.15 Reserves

For members-only, Singles competitions, you may operate a Reserves list when the booking sheet becomes full.

Players on a reserve list will automatically be promoted from the list onto the booking sheet when a space becomes available on the sheet.

The player that has been on the list for the longest time is considered to the first reserve and will be the player promoted when the next space becomes available.

NOTE:

Organisations may choose to limit the members who may join a bookings Reserves List to be those members with MasterScoreboard.co.uk booking e-mail notifications enabled. This is done within the organisation's MasterScoreboard.co.uk control panel.

If this option is enabled then if a member is within a booking Reserves List and they suspend or disable MasterScoreboard.co.uk e-mail notifications they will remain in the Reserves List. They will be advised that they will not receive any notification of being removed from the Reserves list and that they will NOT be promoted into the competition.

To turn on or off the Reserves list

1. [Modify the Booking Arrangements](#)

2. Tick or un-tick the **Operate a Reserves list when booking sheet is full** box, as required.

To view players on the Reserves list

1. Click on Bookings Received in the Bookings Tasks (in the left hand pane). The right hand pane shows the times available for booking.

2. Do one of the following

   - Click the **View** button on the toolbar above the bookings and click **Reserves List**, or

   - Right-click over the booking sheet and in the pop-up menu, select **View Reserves List**

To add a player to the Reserves List

1. View players on the Reserves list (see above)

2. Do one of the following

   - Click the **Add** button on the toolbar above the bookings, or

   - Click the **Add a Player** task in the left-hand column, or

   - Right-click over the list and in the pop-up menu, select **Add a Player** to List, or

- Press the INSERT key on your keyboard.

3. Choose the applicable player and click **OK**.

To remove a player from the Reserves List

1. View players on the Reserves list (see above)

2. Highlight the required player in the list, with a single click over their entry.

3. Do one of the following

- Click the **Remove** button on the toolbar above the bookings, or

- Click the **Remove Player** task in the left-hand column, or

- Right-click over the list and in the pop-up menu, select **Remove Player from List**, or

- Press the DELETE key on your keyboard.

4. Choose the applicable player and click **OK**.

See Also

- Bookings Templates

- Prepare a Competition to receive Bookings

- Opens Competitions; Players paying online to enter competition

- Manage Bookings within HandicapMaster

- Manage Bookings using Player Entry System

- Enable the Bookings Function in Player Entry System

- Online Bookings

- View a History of the Bookings received

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- Configure Booking options

16.2   General Bookings

16.2.1   Introduction

The Bookings facility is available in the Gold editions of HandicapMaster

General Bookings allows you to solicit bookings online to any facility. A facility may be a golf course (i.e. Tee Times) or anything else that may be booked by time, such as Golf Lessons, The Snooker Table, etc.

You may request a payment from the member or visitor at the time they place their booking, which they would pay by debit or credit card.

To take payments, you will need a Merchant account with either SagePay, PayPal or WorldPay. Any money paid by customers will be deposited into this account.

HandicapMaster Ltd applies no transaction charges for these payments, but an additional subscription charge is levied per annum.

Without taking payments or paying the additional charge, you may operate up to 5 schedules at any one time, each with a facility booking price of £0, in a 'trial' mode. There is no limit to when this trial period must end.

Bookings times may be defined with different charges and availability applied to each time within a schedule, based upon Members, Members Guests and/or Visitors.

When creating schedules for golf tee times, these may be set up to automatically take account of daylight hours (avoiding times too early or too late in the day).

Collecting 'General Bookings'

Bookings may be collected through the Master Scoreboard web site.

A broadband internet connection between HandicapMaster and Master Scoreboard web site is required, along with an account on Master Scoreboard.

The Bookings facility is available in the Gold editions of HandicapMaster

Contents

- [Facilities](#)
- [Templates](#)
- [Bookings Schedules](#)
- [Accepting Discount Cards and Vouchers](#)
- [Configure Booking options](#)

16.2.2   Facilities

16.2.2.1   Introduction

The Bookings facility is available in the Gold editions of HandicapMaster

General Bookings allows you to solicit bookings online to any facility.

A facility is anything you may offer that your members or customers may book by choosing a time. For

example, this could be

- A golf course (I.e. booking a tee time for casual play)

- Your Golf Professional's lessons

- The Snooker Table in the clubhouse

- A function room

Contents

- Add a Facility

- Modify a Facility

- Delete a Facility

- Configuring a Facility

16.2.2.2 Add a Facility

The Bookings facility is available in the Gold editions of HandicapMaster

To create a new Facility

1. On the left hand task pane, select **Bookings** place.

2. On the right hand pane, double-click **General Bookings Facilities**.

3. Do one of the following:

   - In the left hand column, click **Add a new Facility**.

   - Press the INSERT key on your keyboard.

   - Right-click any entry in the list and click **New Facility** in the pop-up menu.

4. Enter the details of the facility and click **OK**.

See Also

- Introduction

- Modify a Facility

- Delete a Facility

- Configuring a Facility

16.2.2.3 Modify a Facility

The Bookings facility is available in the Gold editions of HandicapMaster

To modify the details of an existing Facility

1. On the left hand task pane, select **Bookings** place.

2. On the right hand pane, double-click **General Bookings Facilities**.

3. Double-click the facility in the list that you wish to modify.

4. Modify the details of the Facility and click **OK**.

See Also

- Introduction

- Add a Facility

- Delete a Facility

- Configuring a Facility

16.2.2.4 Delete a Facility

The Bookings facility is available in the Gold editions of HandicapMaster

To delete an existing Facility

1. On the left hand task pane, select **Bookings** place.

2. On the right hand pane, double-click **General Bookings Facilities**.

3. Do one of the following:

- Highlight the applicable Facility in the list with a single click then, in the left hand column, click **Delete Facility**.

- Highlight the applicable Facility in the list with a single click then press the DELETE key on your keyboard.

- Right-click any entry in the list and click **Delete Facility** in the pop-up menu.

Note

You may not delete a facility that has one or more booking schedules configured.

See Also

- Introduction

- Add a Facility

- Modify a Facility

- Configuring a Facility

16.2.2.5 Configuring a Facility

The Bookings facility is available in the Gold editions of HandicapMaster

1. In the **Name** box enter a name for this facility. This name will be displayed on the booking web pages, so choose a description that your customers will recognise.

2. In the **Description** box, enter a description for this facility (optional).

3. In the **Type of Facility** list, choose the nature of this facility.

4. Tick the **Limit number of advance bookings members may book** box if you wish to limit the number of future-dated bookings a member may hold for the selected facility at any one time. Enter the maximum number allowed.
Note: Members may book for the current day without it counting towards this limit or this limit being invoked.

5. Tick the **Include on Fixture Lists** box if you wish booking schedules created with this facility to show when creating a Fixture List report and when publishing to Master Scoreboard website.

6. If you have selected *Golf Tee Booking (9-Hole Course)* as the type of facility, then

  a. In the **For 9-hole bookings, discount price by %** box, enter a suitable amount that any booking price will be discounted by, when a player elects to only book to play 9-holes.

  b. In the **For 18-Hole bookings, book a second tee time X minutes later** box, enter the number of minutes (approximately) after the chosen time that a second tee time must be available (and which will be booked alongside the first booking) when a player elects to book 18-holes. The system will scan up to 10 minutes before and 10 minutes after this number of minutes to attempt to locate a second time for the booking.

Booking play over 9-hole golf courses

if you select that booking is for tee times on a 9-Hole golf course, the system will then ask the player placing a booking whether they would like to book for 9 or 18 holes of play.

Where a player elects to book 9-Holes, they will be offered a discounted Green Fee (see "**For 9-hole bookings, discount price by %**" box details above). This means all pricing for tee times over this facility should be set at their normal 18-hole rate, when using this type of facility.

Where a player elects to book 18-Holes, the system will only offer tee times where a second tee time later can be booked (see **For 18-Hole bookings, book a second tee time X minutes later** box details above). The second tee time will also be reserved when placing the booking. Where a tee time is already partially booked, it will not be considered as a suitable second nine tee time, and will be discounted from being offered.

Note:

Where a facility has one of the *Golf Tee Booking* types, this will be inferred as Tee times for the golf course. Competition booking and Group Bookings may be linked to Golf Tee Booking facilities so that tee times are automatically reserved when these are created.

See Also

- Introduction
- Add a Facility
- Modify a Facility
- Delete a Facility

16.2.3 Templates

16.2.3.1 Introduction to General Bookings Templates

The Bookings facility is available in the Gold editions of HandicapMaster

General Bookings Templates define the times that may be booked for a day. When you create a template, you define the range of times available, a default pricing for each time (which may vary through the day), etc.

Once you have a suitable template created, you may create a booking schedule for chosen dates using this template.

Contents

- Create a new Template

- Delete a Template

- Change the fees allocated to one or more than one Time

- Change who may book a Time or Times

- Mark one or more Times as unavailable to book

- Change the window of dates (and times) when one or more Times may be booked

- Change the maximum number of Players that may book a Time

- Add a Time to the start or end of the Template

- Delete one or more Times from the Template

- Create Duplicate Booking for Times

16.2.3.2 Create a General Bookings Template

The Bookings facility is available in the Gold editions of HandicapMaster

To create a new General Bookings Template

1. On the left hand task pane, select **Bookings** place.

2. On the right hand pane, double-click **Bookings Templates (General)**.

3. Do one of the following:

    - In the left hand column, click **Create a new Template**.

    - Press the INSERT key on your keyboard.

    - Right-click any entry in the list and click **New Template** in the pop-up menu.

4. Enter the details of the Template and click **OK**.

See Also

- Delete a Template

- Change the fees allocated to one or more than one Time

- Change who may book a Time or Times

- Mark one or more Times as unavailable to book

- Change the window of dates (and times) when one or more Times may be booked

- Change the maximum number of Players that may book a Time

- Add a Time to the start or end of the Template

- Delete one or more Times from the Template

- Create Duplicate Booking for Times

16.2.3.3 Modify a General Bookings Template

The Bookings facility is available in the Gold editions of HandicapMaster

To modify the name, description, options and/or website notice of an existing General Bookings Template

1. On the left hand task pane, select **Bookings** place.

2. On the right hand pane, double-click **Bookings Templates (General)**.

3. Highlight the template in the list that you wish to modify with a single click.

4. Do one of the following:

    - In the left hand column, click **Edit Template Configuration**.

    - Right-click any entry in the list and click **Edit Template Configuration** in the pop-up menu.

5. Modify the details of the Template and click **OK**.

To view and modify the details of times configured to an existing General Bookings Template

1. On the left hand task pane, select **Bookings** place.

2. On the right hand pane, double-click **Bookings Templates (General)**.

3. Double-click the template in the list that you wish to modify.

4. Modify the times defined to the Template.

See Also

- Create a new Template

- Delete a Template

- Change the fees allocated to one or more than one Time

- Change who may book a Time or Times

- Mark one or more Times as unavailable to book

- Change the window of dates (and times) when one or more Times may be booked

- Change the maximum number of Players that may book a Time

- Add a Time to the start or end of the Template

- [Delete one or more Times from the Template](#)

- [Create Duplicate Booking for Times](#)

16.2.3.4 Delete a General Bookings Template

The Bookings facility is available in the Gold editions of HandicapMaster

To delete an existing General Bookings Template

1. On the left hand task pane, select **Bookings** place.

2. On the right hand pane, double-click **Bookings Templates (General)**.

3. Do one of the following:

   - Highlight the applicable Template in the list with a single click then, in the left hand column, click **Delete Template**.

   - Highlight the applicable Template in the list with a single click then press the DELETE key on your keyboard.

   - Right-click any entry in the list and click **Delete Template** in the pop-up menu.

See Also

- [Create a new Template](#)

- [Change the fees allocated to one or more than one Time](#)

- [Change who may book a Time or Times](#)

- [Mark one or more Times as unavailable to book](#)

- [Change the window of dates (and times) when one or more Times may be booked](#)

- [Change the maximum number of Players that may book a Time](#)

- [Add a Time to the start or end of the Template](#)

- [Delete one or more Times from the Template](#)

- [Create Duplicate Booking for Times](#)

16.2.3.5 The New General Bookings Template Wizard

The Bookings facility is available in the Gold editions of HandicapMaster

The New General Bookings Template Wizard steps through the stages of configuring a template to be used to define future General Booking schedules.

Choose a name for the Template

1. In the **Name** box, enter a suitable name for this Template.

2. In the Description box, enter a description that further describes the purpose for this template. This description will be shown in the list of Templates.

Choose a type of Template to create

Create a Template for section

3. Select one of these types of Template to create:

- **A range of times, with one booking allowed per time**
  This type of bookings schedule is typical of a Golf Tee Booking sheet, where there are a range of times offered a and each time maybe booked once only.

- **A single time, with multiple bookings**
  This type of bookings schedule has one time only, but allows a number of people to book this time. Each booking is independent of any others. This may be applicable for Social events, etc.

- **A range of times, with more than one booking allowed each time**
  This type of bookings schedule is a combination of the above two, where there are two or more different times that may be booked, and each time may be booked more than once. The example given is players booking into one of a number of Group Golf Lessons for that day.

Create some default values

Times section

4. Enter the range of times covered by this template in the **First Time** and **Until** boxes (or **Time** box if creating a single-time template).

5. Enter the time between each bookable time in the **Interval between Times** box (not applicable where only one time is being booked).

6. Choose the number of bookings that may be made *against each time* in the **Maximum number of separate bookings that may be received** box. Use a number above 1 if you want multiple people to be able to independently book the same time.

7. Where applicable, choose the maximum number of people that may be booked at the same time in the **Maximum number of people that may be booked each time a booking is placed** box.

8. Where applicable, tick the **Is overall limit to the number of people that may be booked** box if you wish to set a limit to overall number of people that may be booked into each time.This may be useful where setting up a Tee Sheet, for example, and there is an overall limit of four players per Tee Time. Enter the limit in the **Overall Maximum** box.

Who can book and how much

May be booked by section

9. Choose who may book these times by selecting **Members**, **Members may book Guests** and **Visitors** boxes.

Fees section

10.Choose the price that will be charged in the **Members**, **Members Guests** and **Visitors** boxes.

Discount Schemes

Discount Schemes section

11.If you wish customers to be able to checkout using discount cards or vouchers (e.g. County Card, 2-For-1 schemes, etc.), tick **Discount Cards and Vouchers accepted** box. Then tick the box alongside any scheme that you wish customers to be able to use when booking schedules created with this template

  Note: You are limited to a maximum of twelve schemes per template.

12.If you wish to modify the list of schemes, click **Configure Discount Schemes** button.

Choose Booking Window

Bookings to be accepted section

13. Enter the time of day when the Times can first be booked in the **From** box.

14. Enter how may days prior to the event date the times may be booked for the first time in the **prior to the event date** box.

15. If you wish to the bookings to close before the schedule date, click **Bookings close early** and enter the **Last booking date** settings.

Options section

16. Tick **Name of Partners must be recorded with booking** box if you wish to ensure that the names and gender of any partners booked have to be recorded by the person placing the booking.

17. Tick **Limit Members to one entry into each schedule** box if you wish members to be prevented from having their name entered more than once into the same schedule (i.e. more than once for the same day).

18. Tick **Members may view bookings received** box if you would your members to be able to view the bookings received (including the names of those who have booked) online.

19. Tick **Ask additional question when receiving bookings** box if you wish to collect additional information when bookings are collected. You may

   a) Enter the text of the question you wish to ask in the **Question** box.

   b) Select the type of answer that you wish to allow people to supply. May be **Text**, **Number**, **Date** or **Yes/No**. If you choose Number, you can define the range that may be selected. You can also select the default value, as you can with Yes/No question.

Public notice for booking page on web site

20. If you wish to display a notice on the bookings page for schedules created using this template, enter the text of the message in the **You may enter a public notice that will be displayed above the booking form on the Master Scoreboard web site** box.

   You may highlight sections of the text in bold on the website be encasing the applicable sections of text in and delimiters. For example:
   ```
   This is <b>bold</b> text
   ```

21. Click **Finish** button to save the template.

See Also

- Create a new Template

- Delete a Template

- Change the fees allocated to one or more than one Time

- Change who may book a Time or Times

- Mark one or more Times as unavailable to book

- Change the window of dates (and times) when one or more Times may be booked

- Change the maximum number of Players that may book a Time

- Add a Time to the start or end of the Template

- Delete one or more Times from the Template

- Create Duplicate Booking for Times

16.2.3.6 Modify the times defined to a General Bookings Template

The Bookings facility is available in the Gold editions of HandicapMaster

When you view the times defined to a General Bookings Template, you may …

- Change the fees allocated to one or more than one Time

- Change who may book a Time or Times

- Mark one or more Times as unavailable to book

- Change the window of dates (and times) when one or more Times may be booked

- Change the maximum number of Players that may book a Time

- Add a Time to the start or end of the Template

- Delete one or more Times from the Template

- Create Duplicate Booking for Times

See Also

- Create a new Template

- Delete a Template

16.2.3.7 Change the fees allocated to Times in a General Bookings Template

The Bookings facility is available in the Gold editions of HandicapMaster

To change the fees allocated to Times in a template

Display the times configured to the Template, then ...

1. Select the time or times that you wish to modify. Do one of the following:

   - Highlight a Time in the list with a single click

   - Highlight a block of times in the list by clicking the first time and, whilst holding the mouse button down, drag the mouse through the list of times to be selected

   - Highlight two or more non-contiguous times by holding the CONTROL key down on the keyboard whilst double-clicking each applicable time.

2. Do one of the following:

   - Click the **Change Fee** button on the toolbar above the list of times, or

   - Right-click over one of the selected Times and click **Change Fee** in the pop-up menu.

See Also

- [Create a new Template](#)

- [Delete a Template](#)

- [Change who may book a Time or Times](#)

- [Mark one or more Times as unavailable to book](#)

- [Change the window of dates (and times) when one or more Times may be booked](#)

- [Change the maximum number of Players that may book a Time](#)

- [Add a Time to the start or end of the Template](#)

- [Delete one or more Times from the Template](#)

- [Create Duplicate Booking for Times](#)

16.2.3.8 Change who may book Times defined in a General Bookings Template

The Bookings facility is available in the Gold editions of HandicapMaster

To change who may book Times

[Display the times configured to the Template](#), then ...

1. Select the time or times that you wish to modify. Do one of the following:

   - Highlight a Time in the list with a single click

   - Highlight a block of times in the list by clicking the first time and, whilst holding the mouse button down, drag the mouse through the list of times to be selected

   - Highlight two or more non-contiguous times by holding the CONTROL key down on the keyboard whilst double-clicking each applicable time.

2. Do one of the following:

   - Click the **Change Availability** button on the toolbar above the list of times, or

   - Right-click over one of the selected Times and click **Change Availability** in the pop-up menu.

3. Select whether *Members*, *Members Guests* and/or *Visitors* may book the Time(s).

See Also

- [Create a new Template](#)

- [Delete a Template](#)

- [Change the fees allocated to one or more than one Time](#)

- [Mark one or more Times as unavailable to book](#)

- [Change the window of dates (and times) when one or more Times may be booked](#)

- [Change the maximum number of Players that may book a Time](#)

- [Add a Time to the start or end of the Template](#)

- [Delete one or more Times from the Template](#)

- [Create Duplicate Booking for Times](#)

16.2.3.9 Mark Times in a General Bookings Template as unavailable to book

The Bookings facility is available in the Gold editions of HandicapMaster

To mark a Time, or Times, in a template as unavailable for booking

Display the times configured to the Template, then ...

1. Select the time or times that you wish to modify. Do one of the following:

   - Highlight a Time in the list with a single click

   - Highlight a block of times in the list by clicking the first time and, whilst holding the mouse button down, drag the mouse through the list of times to be selected

   - Highlight two or more non-contiguous times by holding the CONTROL key down on the keyboard whilst double-clicking each applicable time.

2. Do one of the following:

   - Click the **Mark as Unavailable** button on the toolbar above the list of times, or

   - Right-click over one of the selected Times and click **Mark as Unavailable** in the pop-up menu.

See Also

- Create a new Template

- Delete a Template

- Change the fees allocated to one or more than one Time

- Change who may book a Time or Times

- Change the window of dates (and times) when one or more Times may be booked

- Change the maximum number of Players that may book a Time

- Add a Time to the start or end of the Template

- Delete one or more Times from the Template

- Create Duplicate Booking for Times

16.2.3.10 Change when Times may be booked in a General Bookings Template

The Bookings facility is available in the Gold editions of HandicapMaster

To change the window when a Time, or Times, will be available to book (as defined in a Template)

Display the times configured to the Template, then ...

1. Select the time or times that you wish to modify. Do one of the following:

   - Highlight a Time in the list with a single click

   - Highlight a block of times in the list by clicking the first time and, whilst holding the mouse button down, drag the mouse through the list of times to be selected

   - Highlight two or more non-contiguous times by holding the CONTROL key down on the keyboard whilst double-clicking each applicable time.

2. Do one of the following:

- Click the **Change Booking Window** button on the toolbar above the list of times, or

- Right-click over one of the selected Times and click **Change Booking Window** in the pop-up menu.

3. Choose the time and number of days prior to the event date when Members and Visitors may book the time(s).

See Also

- [Create a new Template](#)

- [Delete a Template](#)

- [Change the fees allocated to one or more than one Time](#)

- [Change who may book a Time or Times](#)

- [Mark one or more Times as unavailable to book](#)

- [Change the maximum number of Players that may book a Time](#)

- [Add a Time to the start or end of the Template](#)

- [Delete one or more Times from the Template](#)

- [Create Duplicate Booking for Times](#)

16.2.3.11 Change the maximum number of Players that may book a Time

The Bookings facility is available in the Gold editions of HandicapMaster

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To change how many players may book a Time (when more than one booking per Time is configured)

[Display the times configured to the Template](#), then ...

1. Select the time or times that you wish to modify. Do one of the following:

- Highlight a Time in the list with a single click

- Highlight a block of times in the list by clicking the first time and, whilst holding the mouse button down, drag the mouse through the list of times to be selected

- Highlight two or more non-contiguous times by holding the CONTROL key down on the keyboard whilst double-clicking each applicable time.

2. Do one of the following:

- Click the **Times** button on the toolbar above the list of times, then click **Change Maximum People Per Time**, or

- Right-click over a Time in the list and click **Change Maximum People Per Time** in the pop-up menu.

3. Enter the maximum number of people that may book the selected times.

Contents

- [Create a new Template](#)

- [Delete a Template](#)

- [Change the fees allocated to one or more than one Time](#)

- [Change who may book a Time or Times](#)

- [Mark one or more Times as unavailable to book](#)

- [Change the window of dates (and times) when one or more Times may be booked](#)

- [Add a Time to the start or end of the Template](#)

- [Delete one or more Times from the Template](#)

- [Create Duplicate Booking for Times](#)

16.2.3.12 Add a Time to the start or end of a General Bookings Template

The Bookings facility is available in the Gold editions of HandicapMaster

To add a Time to the beginning or end of a Template

[Display the times configured to the Template](#), then ...

1. Do one of the following:

    - Click the **Times** button on the toolbar above the list of times, then click **Add to Start** or **Add to End**, or

    - Right-click over a Time in the list and click **Add to Start** or **Add to End** in the pop-up menu.

See Also

- [Create a new Template](#)

- [Delete a Template](#)

- [Change the fees allocated to one or more than one Time](#)

- [Change who may book a Time or Times](#)

- [Mark one or more Times as unavailable to book](#)

- [Change the window of dates (and times) when one or more Times may be booked](#)

- [Change the maximum number of Players that may book a Time](#)

- [Delete one or more Times from the Template](#)

- [Create Duplicate Booking for Times](#)

16.2.3.13 Delete one or more Times from a General Bookings Template

The Bookings facility is available in the Gold editions of HandicapMaster

To delete a Time, or Times, from a Template

[Display the times configured to the Template](#), then ...

1. Select the time or times that you wish to delete. Do one of the following:

- Highlight a Time in the list with a single click

- Highlight a block of times in the list by clicking the first time and, whilst holding the mouse button down, drag the mouse through the list of times to be selected

- Highlight two or more non-contiguous times by holding the CONTROL key down on the keyboard whilst double-clicking each applicable time.

2. Do one of the following:

- Click the **Times** button on the toolbar above the list of times, then click **Delete Times** or

- Right-click over one of the selected Times and click **Delete Times** in the pop-up menu.

See Also

- [Create a new Template](#)

- [Delete a Template](#)

- [Change the fees allocated to one or more than one Time](#)

- [Change who may book a Time or Times](#)

- [Mark one or more Times as unavailable to book](#)

- [Change the window of dates (and times) when one or more Times may be booked](#)

- [Change the maximum number of Players that may book a Time](#)

- [Add a Time to the start or end of the Template](#)

- [Create Duplicate Booking for Times](#)

16.2.3.14 Create Duplicate Booking for Times

The Bookings facility is available in the Gold editions of HandicapMaster

Duplicate booking allows you to create more than one entry for the same time in a schedule. When you do this, you can receive more than one booking for that time.

To enable additional bookings to be independently received for a time or times

[Display the times configured to the Template](#), then ...

1. Select the time or times that you wish to duplicate. Do one of the following:

- Highlight a Time in the list with a single click

- Highlight a block of times in the list by clicking the first time and, whilst holding the mouse button down, drag the mouse through the list of times to be selected

- Highlight two or more non-contiguous times by holding the CONTROL key down on the keyboard whilst double-clicking each applicable time.

2. Do one of the following:

- Click the **Times** button on the toolbar above the list of times, then click **Duplicate** or

- Right-click over one of the selected Times and click **Duplicate** in the pop-up menu.

3. In the **Additional Entries** box, choose how many additional entries in the schedule you wish to create

(applies to each selected time).

See Also

- Create a new Template

- Delete a Template

- Change the fees allocated to one or more than one Time

- Change who may book a Time or Times

- Mark one or more Times as unavailable to book

- Change the window of dates (and times) when one or more Times may be booked

- Change the maximum number of Players that may book a Time

- Add a Time to the start or end of the Template

- Delete one or more Times from the Template

16.2.4 Managing schedules and receiving bookings

16.2.4.1 Introduction

The Bookings facility is available in the Gold editions of HandicapMaster

In order to receive bookings for a facility, you need to create *schedules*. A schedule is a set of times made available for booking, for a facility, for a specific date.

You may only create one schedule per facility per date.

Schedules may only be created from General Bookings Templates, which define the Times, their fees and their availability, etc.

Once a schedule has been created, you may record bookings received, reserve times for Group Bookings and Competitions, and receive bookings taken online through the Master Scoreboard website.

Contents

- Create a new bookings schedule

- View a Booking Schedule

- Modify an existing schedule

    - Change the Fees to be charged for one or more Times

    - Change who may book one or more Times

    - Mark Times as unavailable

    - Change when Times may be booked

    - Change the maximum number of Players that may book a Time

    - Add an additional Time to the start or end of the schedule

    - Create Duplicate Booking for times

- [Change options, discount schemes and web site notice](#)

- [Stop a schedule showing on Fixture Lists](#)

- [Limit number of bookings a member may request](#)

- [View a different schedule](#)

- [Delete a bookings schedule](#)

- [Record a Booking](#)

- [Record a Group Booking](#)

- [View a Booking received](#)

- [Create a receipt for a Booking](#)

- [Cancel a Booking](#)

- [Create a report of a schedule and its bookings](#)

16.2.4.2 Create a new bookings schedule

The Bookings facility is available in the Gold editions of HandicapMaster

To create a new Bookings schedule

Before you can create a bookings schedule, you will need to have created a [Facility](#) record and one or more [General Bookings Templates](#).

1. On the left hand task pane, select **Bookings** place.

2. On the right hand pane, double-click **Bookings**.

3. Do one of the following:

   - In the left hand column, click **Create New Bookings Schedule**.

   - Press the INSERT key on your keyboard.

   - Right-click any entry in the list and click **New Bookings Schedule** in the pop-up menu.

4. In the **Create bookings for** box, select the Facility that you wish to offer for booking.

5. In the **From** and **To** boxes, enter the range of dates that you wish to create schedules for. All dates between the From and To dates (inclusive) will have a separate bookings schedule created.

6. In the **Using Template** box, choose the General Bookings Template to be used.

7. Tick the **use a different template for weekends** box if you wish weekend dates to be based upon a different template. If so, then select the alternative Template in the **Template (Weekends)** box.

8. Click **OK**.

See Also

- [View a Booking Schedule](#)

- [Modify an existing schedule](#)

- [Change the Fees to be charged for one or more Times](#)

- [Change who may book one or more Times](#)

- [Mark Times as unavailable](#)

- [Change when Times may be booked](#)

- [Change the maximum number of Players that may book a Time](#)

- [Add an additional Time to the start or end of the schedule](#)

- [Create Duplicate Booking for times](#)

- [Change options, discount schemes and web site notice](#)

- [Stop a schedule showing on Fixture Lists](#)

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- [Record a Group Booking](#)

- [View a Booking received](#)

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- [Cancel a Booking](#)

- [Create a report of a schedule and its bookings](#)

16.2.4.3 View a Booking Schedule

The Bookings facility is available in the Gold editions of HandicapMaster

To view a Bookings schedule

1. On the left hand task pane, select **Bookings** place.

2. On the right hand pane, double-click **Bookings**.

3. Do one of the following:

   - Highlight the applicable entry in the list with a single click then, in the left hand column, click **View Bookings**.

   - Double-click the applicable entry in the list.

   - Right-click the applicable entry in the list and click **View** in the pop-up menu.

See Also

- [Create a new bookings schedule](#)

- [Modify an existing schedule](#)

  - [Change the Fees to be charged for one or more Times](#)

- Change who may book one or more Times

- Mark Times as unavailable

- Change when Times may be booked

- Change the maximum number of Players that may book a Time

- Add an additional Time to the start or end of the schedule

- Create Duplicate Booking for times

- Change options, discount schemes and web site notice

- Stop a schedule showing on Fixture Lists

- Limit number of bookings a member may request

- View a different schedule

- Delete a bookings schedule

- Record a Booking

- Record a Group Booking

- View a Booking received

- Create a receipt for a Booking

- Cancel a Booking

- Create a report of a schedule and its bookings

16.2.4.4 Modify an existing schedule

The Bookings facility is available in the Gold editions of HandicapMaster

To modify a Bookings schedule

1. View an existing Schedule.

2. You may now modify the schedule by

- Record a Booking

- Record a Group Booking

- View a Booking received

- Create a receipt for a Booking

- Cancel a Booking

- Create a report of a schedule and its bookings

- Change the Fees to be charged for one or more Times

- Change who may book one or more Times

- Mark Times as unavailable

- [Change when Times may be booked](#)

- [Change the maximum number of Players that may book a Time](#)

- [Add an additional Time to the start or end of the schedule](#)

- [Create Duplicate Booking for times](#)

- [Change options, discount schemes and web site notice](#)

- [Stop a schedule showing on Fixture Lists](#)

- [View a different schedule](#)

See Also

- [Create a new bookings schedule](#)

- [View a Booking Schedule](#)

- [Delete a bookings schedule](#)

- [Record a Booking](#)

- [Record a Group Booking](#)

- [View a Booking received](#)

- [Create a receipt for a Booking](#)

- [Cancel a Booking](#)

- [Create a report of a schedule and its bookings](#)

16.2.4.5 Delete a bookings schedule

The Bookings facility is available in the Gold editions of HandicapMaster

To delete a Bookings schedule

If you do not need the records for a Booking Schedule anymore, you may delete it.

Note: Deleting a Schedule will also delete the bookings recorded on this schedule (Competition Bookings and Group Bookings referred to on the schedule will not be deleted).

1. On the left hand task pane, select **Bookings** place.

2. On the right hand pane, double-click **Bookings**.

3. Do one of the following:

   - Highlight the applicable entry in the list with a single click then, in the left hand column, click **Delete Bookings Schedule**.

   - Highlight the applicable entry in the list with a single click then press the DELETE key on your keyboard.

   - Right-click the applicable entry in the list and click **Delete Bookings Schedule** in the pop-up menu.

4. In the **Cancel bookings for** box, confirm the Facility that you wish to cancel the schedule for.

5. In the **From** and **To** boxes, confirm the date that you wish to cancel. You may expand the range of

dates to a series of schedules.

6. Click **OK**.

16.2.4.6 Record a Booking

The Bookings facility is available in the Gold editions of HandicapMaster

To record a Booking for a single Time

1. [View the applicable Schedule](#).

2. Do one of the following:

- Highlight the applicable Time in the list with a single click then, in the toolbar above the list, click **Booking** button then **New Booking.**

- Double-click the applicable entry in the list.

- Right-click the applicable entry in the list and click **New Booking** in the pop-up menu.

3. Click **Record Booking** button (available if there is currently no booking for this time).

4. If the booking has been placed by a Member:

   a. Select **Member** and click **Next**.

   b. Highlight the member who placed the booking and click **Next**.

5. If the booking has been placed by a Visitor (i.e. non-member):

   a. Select **Visitor** and click **Next**.

   b. Record the details of the Visitor and click **Next**.

6. In the **Number of Members in Booking** box, select the number of members to be recorded in this booking.

7. In the **Number of Visitors in Booking** box, select the number of visitors to be recorded in this booking.

8. In the **Fee Paid** box, enter the fee received for the booking.

9. If you have selected *Golf Tee Booking (9-Hole Course)* as the type of facility, then tick **Also book a second tee time of ...** box if you wish the booking to be an 18-hole booking and you wish a second tee time to automatically be reserved as part of this booking.

10. Click **Next**.

11. Record any additional Members or Visitors, as applicable.

12. Tick the box alongside any Discount Schemes claimed by the customer for this booking.

13. Click **Finish**.

To record a Booking spanning more than one Time

If the booking spans more than one contiguous Time, and the facility is of type *Golf Tee Booking*, then record the booking as a Group Booking.

See Also

- Create a new bookings schedule

- View a Booking Schedule

- Modify an existing schedule

  - Change the Fees to be charged for one or more Times

  - Change who may book one or more Times

  - Mark Times as unavailable

  - Change when Times may be booked

  - Change the maximum number of Players that may book a Time

  - Add an additional Time to the start or end of the schedule

  - Create Duplicate Booking for times

  - Change options, discount schemes and web site notice

- Stop a schedule showing on Fixture Lists

  - Limit number of bookings a member may request

  - View a different schedule

- Delete a bookings schedule

- Record a Group Booking

- View a Booking received

- Create a receipt for a Booking

- Cancel a Booking

- Create a report of a schedule and its bookings

16.2.4.7 Record a Group Booking (whilst viewing a General Bookings schedule)

The Bookings facility is available in the Gold editions of HandicapMaster

To record a Group Booking (whilst viewing a General Bookings schedule)

1. View the applicable Schedule.

2. Highlight the group of times to be booked by dragging the mouse cursor through the applicable times.

3. Do one of the following:

   - Click the **Group Booking** button on the toolbar above the list, or

   - Right-click over the times and select **New Group Booking** in the pop-up menu.

4. Record the Booking using the Group Booking wizard.

Note:

To record a Group Booking from a General Bookings schedule, the schedule must be for a Facility that is defined as type *Golf Tee Booking*. When a schedule for a different type of Facility is displayed, the Group Booking options are not displayed.

See Also

- Create a new bookings schedule

- View a Booking Schedule

- Modify an existing schedule

  - Change the Fees to be charged for one or more Times

  - Change who may book one or more Times

  - Mark Times as unavailable

  - Change when Times may be booked

  - Change the maximum number of Players that may book a Time

  - Add an additional Time to the start or end of the schedule

- Create Duplicate Booking for times

- Change options, discount schemes and web site notice

- Stop a schedule showing on Fixture Lists

- Limit number of bookings a member may request

- View a different schedule

- Delete a bookings schedule

- Record a Booking

- View a Booking received

- Create a receipt for a Booking

- Cancel a Booking

- Create a report of a schedule and its bookings

16.2.4.8 View a Booking received

The Bookings facility is available in the Gold editions of HandicapMaster

To view a Booking

1. View the applicable Schedule.

2. Do one of the following:

- Highlight the applicable Time in the list with a single click then, in the toolbar above the list, click **Booking** button then **View Booking.**

- Double-click the applicable entry in the list.

- Right-click the applicable entry in the list and click **View Booking** in the pop-up menu.

See Also

- Create a new bookings schedule

- View a Booking Schedule

- Modify an existing schedule

  - Change the Fees to be charged for one or more Times

  - Change who may book one or more Times

  - Mark Times as unavailable

  - Change when Times may be booked

  - Change the maximum number of Players that may book a Time

  - Add an additional Time to the start or end of the schedule

  - Create Duplicate Booking for times

  - Change options, discount schemes and web site notice

- Stop a schedule showing on Fixture Lists

- Limit number of bookings a member may request

- View a different schedule

- Delete a bookings schedule

- Record a Booking

- Record a Group Booking

- Create a receipt for a Booking

- Cancel a Booking

- Create a report of a schedule and its bookings

16.2.4.9 Create a receipt for a Booking

The Bookings facility is available in the Gold editions of HandicapMaster

To create a receipt for a Booking

1. View the applicable Schedule.

2. Do one of the following:

- Highlight the applicable Time in the list with a single click then, in the toolbar above the list, click **Booking** button then **Booking Receipt.**

- Double-click the applicable entry in the list and then click **Receipt** on the toolbar,

- Right-click the applicable entry in the list and click **Booking Receipt** in the pop-up menu.

See Also

- Create a new bookings schedule

- View a Booking Schedule

- Modify an existing schedule

  - Change the Fees to be charged for one or more Times

  - Change who may book one or more Times

  - Mark Times as unavailable

  - Change when Times may be booked

  - Change the maximum number of Players that may book a Time

  - Add an additional Time to the start or end of the schedule

  - Create Duplicate Booking for times

  - Change options, discount schemes and web site notice

  - Stop a schedule showing on Fixture Lists

  - Limit number of bookings a member may request

- View a different schedule

- Delete a bookings schedule

- Record a Booking

- Record a Group Booking

- View a Booking received

- Cancel a Booking

- Create a report of a schedule and its bookings

16.2.4.10 Cancel a Booking

The Bookings facility is available in the Gold editions of HandicapMaster

To cancel a Booking from the system

1. View the applicable Schedule.

2. Do one of the following:

   - Highlight the applicable Time in the list with a single click then, in the toolbar above the list, click **Booking** button then **Cancel Booking.**

   - Highlight the applicable Time in the list with a single click then press the DELETE key on your keyboard.

   - Right-click the applicable entry in the list and click **Cancel Booking** in the pop-up menu.

See Also

- Create a new bookings schedule

- View a Booking Schedule

- Modify an existing schedule

  - Change the Fees to be charged for one or more Times

  - Change who may book one or more Times

  - Mark Times as unavailable

  - Change when Times may be booked

  - Change the maximum number of Players that may book a Time

  - Add an additional Time to the start or end of the schedule

  - Create Duplicate Booking for times

  - Change options, discount schemes and web site notice

  - Stop a schedule showing on Fixture Lists

  - Limit number of bookings a member may request

  - View a different schedule

- Delete a bookings schedule

- Record a Booking

- Record a Group Booking

- View a Booking received

- Create a receipt for a Booking

- Create a report of a schedule and its bookings

16.2.4.11 Create a report of a schedule and its bookings

The Bookings facility is available in the Gold editions of HandicapMaster

To create a report of a bookings schedule

1. View the applicable Schedule.

2. Above the schedule list, click **Report** button.

This report may then be printed if required.

See Also

- Create a new bookings schedule

- View a Booking Schedule

- Modify an existing schedule

  - Change the Fees to be charged for one or more Times

  - Change who may book one or more Times

  - Mark Times as unavailable

  - Change when Times may be booked

  - Change the maximum number of Players that may book a Time

  - Add an additional Time to the start or end of the schedule

  - Create Duplicate Booking for times

  - Change options, discount schemes and web site notice

  - Stop a schedule showing on Fixture Lists

  - Limit number of bookings a member may request

  - View a different schedule

- Delete a bookings schedule

- Record a Booking

- Record a Group Booking

- View a Booking received

- Create a receipt for a Booking

- Cancel a Booking

16.2.4.12 Create a bookings report for a range of schedules

The Bookings facility is available in the Gold editions of HandicapMaster

To create a bookings report for a range of schedules

1.   Do one of the following:

- On the **Reports** drop-down menu, select **Bookings Reports** then select the report **General Bookings Schedule (Date Range)**

- On the left hand task pane, select **Reports** place. Select the **Bookings** tab. Double click **General Bookings Schedule (Date Range)** in the Bookings reports list..

2. In the **Report of Bookings Schedules** box, select the Facility that you wish to to produce a report.

3. In the **From** and **To** boxes, enter the range of dates that you wish to report the bookings from the schedules for. All dates between the From and To dates (inclusive) will be included in the report.

Notes

- If the selected date range has no schedules a blank report with 'No Records Found' is displayed.

- If the booking schedule within the date range selected has gaps where there are no bookings for a specific date then those dates are displayed with a message indicating no data is available for that date.

16.2.4.13 Change the Fees to be charged for one or more Times

The Bookings facility is available in the Gold editions of HandicapMaster

To change the fees allocated to Times in a schedule

To change all times in a schedule, or multiple schedules

1. On the left hand task pane, select **Bookings** place.

2. On the right hand pane, double-click **Bookings**.

3. Right-click over a selected schedule and click **Change Fee** in the pop-up menu.

3. Enter the new fees to be applied and click **OK**.

4. Choose the range of dates to apply the change to and click **OK**.

Note: This will apply the selected prices to all of the times in the selected schedules.

To change some times within a selected schedule

1. View the applicable Schedule.

2. Select the time or times that you wish to modify. Do one of the following:

- Highlight a Time in the list with a single click

- Highlight a block of times in the list by clicking the first time and, whilst holding the mouse button down, drag the mouse through the list of times to be selected

- Highlight two or more non-contiguous times by holding the CONTROL key down on the keyboard

whilst double-clicking each applicable time.

1. Do one of the following:

- Click the **Times** button on the toolbar above the list of times, then click **Change Fee** or

- Right-click over one of the selected Times and click **Change Fee** in the pop-up menu.

See Also

- Create a new bookings schedule

- View a Booking Schedule

- Modify an existing schedule

   - Change who may book one or more Times

   - Mark Times as unavailable

   - Change when Times may be booked

   - Change the maximum number of Players that may book a Time

   - Add an additional Time to the start or end of the schedule

   - Create Duplicate Booking for times

   - Change options, discount schemes and web site notice

   - Stop a schedule showing on Fixture Lists

   - Limit number of bookings a member may request]

   - View a different schedule

- Delete a bookings schedule

- Record a Booking

- Record a Group Booking

- View a Booking received

- Create a receipt for a Booking

- Cancel a Booking

- Create a report of a schedule and its bookings

16.2.4.14 Change who may book one or more Times

The Bookings facility is available in the Gold editions of HandicapMaster

To change who may book Times in a schedule

1. View the applicable Schedule.

2. Select the time or times that you wish to modify. Do one of the following:

- Highlight a Time in the list with a single click

- Highlight a block of times in the list by clicking the first time and, whilst holding the mouse button down, drag the mouse through the list of times to be selected

- Highlight two or more non-contiguous times by holding the CONTROL key down on the keyboard whilst double-clicking each applicable time.

3. Do one of the following:

- Click the **Times** button on the toolbar above the list of times, then click **Change Availability** or

- Right-click over one of the selected Times and click **Change Availability** in the pop-up menu.

3. Select whether *Members*, *Members Guests* and/or *Visitors* may book the Time(s).

See Also

- Create a new bookings schedule

- View a Booking Schedule

- Modify an existing schedule

  - Change the Fees to be charged for one or more Times

  - Mark Times as unavailable

  - Change when Times may be booked

  - Change the maximum number of Players that may book a Time

  - Add an additional Time to the start or end of the schedule

  - Create Duplicate Booking for times

  - Change options, discount schemes and web site notice

  - Stop a schedule showing on Fixture Lists

  - Limit number of bookings a member may request

  - View a different schedule

- Delete a bookings schedule

- Record a Booking

- Record a Group Booking

- View a Booking received

- Create a receipt for a Booking

- Cancel a Booking

- Create a report of a schedule and its bookings

16.2.4.15 Mark Times as unavailable

The Bookings facility is available in the Gold editions of HandicapMaster

To mark a Time, or Times, in a schedule as unavailable for booking

1. View the applicable Schedule.

2. Select the time or times that you wish to modify. Do one of the following:

   - Highlight a Time in the list with a single click

   - Highlight a block of times in the list by clicking the first time and, whilst holding the mouse button down, drag the mouse through the list of times to be selected

   - Highlight two or more non-contiguous times by holding the CONTROL key down on the keyboard whilst double-clicking each applicable time.

3. Do one of the following:

   - Click the **Times** button on the toolbar above the list of times, then click **Mark as Unavailable** or

   - Right-click over one of the selected Times and click **Mark as Unavailable** in the pop-up menu.

See Also

- Create a new bookings schedule

- View a Booking Schedule

- Modify an existing schedule

  - Change the Fees to be charged for one or more Times

  - Change who may book one or more Times

  - Change when Times may be booked

  - Change the maximum number of Players that may book a Time

  - Add an additional Time to the start or end of the schedule

  - Create Duplicate Booking for times

  - Change options, discount schemes and web site notice

  - Stop a schedule showing on Fixture Lists

  - Limit number of bookings a member may request

  - View a different schedule

- Delete a bookings schedule

- Record a Booking

- Record a Group Booking

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- Cancel a Booking

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16.2.4.16 Change when Times may be booked

The Bookings facility is available in the Gold editions of HandicapMaster

To change the window when a Time, or Times, will be available to book (in a Schedule)

1. View the applicable Schedule.

2. Select the time or times that you wish to modify. Do one of the following:

    • Highlight a Time in the list with a single click

    • Highlight a block of times in the list by clicking the first time and, whilst holding the mouse button down, drag the mouse through the list of times to be selected

    • Highlight two or more non-contiguous times by holding the CONTROL key down on the keyboard whilst double-clicking each applicable time.

3. Do one of the following:

    • Click the **Times** button on the toolbar above the list of times, then click **Change Booking Window,** or

    • Right-click over one of the selected Times and click **Change Booking Window** in the pop-up menu.

3. Choose the time and number of days prior to the event date when Members and Visitors may book the time(s).

See Also

• Create a new bookings schedule

• View a Booking Schedule

• Modify an existing schedule

    • Change the Fees to be charged for one or more Times

    • Change who may book one or more Times

    • Mark Times as unavailable

    • Change the maximum number of Players that may book a Time

    • Add an additional Time to the start or end of the schedule

    • Create Duplicate Booking for times

    • Change options, discount schemes and web site notice

    • Stop a schedule showing on Fixture Lists

    • Limit number of bookings a member may request

    • View a different schedule

• Delete a bookings schedule

• Record a Booking

• Record a Group Booking

• View a Booking received

- [Create a receipt for a Booking](#)

- [Cancel a Booking](#)

- [Create a report of a schedule and its bookings](#)

16.2.4.17 Change the maximum number of Players that may book a Time

The Bookings facility is available in the Gold editions of HandicapMaster

To change how many players may book a Time (when more than one booking per Time is configured)

To change all times in a schedule, or multiple schedules

1. On the left hand task pane, select **Bookings** place.

2. On the right hand pane, double-click **Bookings**.

3. Right-click over a selected schedule and click **Change Maximum People Per Time** in the pop-up menu.

3. Enter the maximum number of people that may book the selected times and click **OK**.

4. Choose the range of dates to apply the change to and click **OK**.

To change some times within a selected schedule

1. [View the applicable Schedule](#).

2. Select the time or times that you wish to modify. Do one of the following:

   - Highlight a Time in the list with a single click

   - Highlight a block of times in the list by clicking the first time and, whilst holding the mouse button down, drag the mouse through the list of times to be selected

   - Highlight two or more non-contiguous times by holding the CONTROL key down on the keyboard whilst double-clicking each applicable time.

3. Do one of the following:

   - Click the **Times** button on the toolbar above the list of times, then click **Change Maximum People Per Time,** or

   - Right-click over one of the selected Times and click **Change Maximum People Per Time** in the pop-up menu.

5. Enter the maximum number of people that may book the selected times.

See also

- [Create a new bookings schedule](#)

- [View a Booking Schedule](#)

- [Modify an existing schedule](#)

- Change the Fees to be charged for one or more Times

- Change who may book one or more Times

- Mark Times as unavailable

- Change when Times may be booked

- Add an additional Time to the start or end of the schedule

- Create Duplicate Booking for times

- Change options, discount schemes and web site notice

- Stop a schedule showing on Fixture Lists

- Limit number of bookings a member may request

- View a different schedule

- Delete a bookings schedule

- Record a Booking

- Record a Group Booking

- View a Booking received

- Create a receipt for a Booking

- Cancel a Booking

- Create a report of a schedule and its bookings

16.2.4.18 Add an additional Time to the start or end of the schedule

The Bookings facility is available in the Gold editions of HandicapMaster

To add a Time to the beginning or end of an existing schedule

1. View the applicable Schedule.

2. Click the **Times** button on the toolbar above the list of times, then click **Add to Start** or **Add to End**.

See Also

- Create a new bookings schedule

- View a Booking Schedule

- Modify an existing schedule

    - Change the Fees to be charged for one or more Times

    - Change who may book one or more Times

    - Mark Times as unavailable

    - Change when Times may be booked

    - Change the maximum number of Players that may book a Time

    - Create Duplicate Booking for times

- Change options, discount schemes and web site notice

- Stop a schedule showing on Fixture Lists

- Limit number of bookings a member may request

- View a different schedule

- Delete a bookings schedule

- Record a Booking

- Record a Group Booking

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- Create a report of a schedule and its bookings

16.2.4.19 Create Duplicate Booking for times

The Bookings facility is available in the Gold editions of HandicapMaster

Duplicate booking allows you to create more than one entry for the same time in a schedule. When you do this, you can receive more than one booking for that time.

To enable additional bookings to be independently received for a time or times

1. View the applicable Schedule.

2. Select the time or times that you wish to modify. Do one of the following:

   - Highlight a Time in the list with a single click

   - Highlight a block of times in the list by clicking the first time and, whilst holding the mouse button down, drag the mouse through the list of times to be selected

   - Highlight two or more non-contiguous times by holding the CONTROL key down on the keyboard whilst double-clicking each applicable time.

3. Do one of the following:

   - Click the **Times** button on the toolbar above the list of times, then click **Duplicate** or

   - Right-click over one of the selected Times and click **Duplicate** in the pop-up menu.

3. In the **Additional Entries** box, choose how many additional entries in the schedule you wish to create (applies to each selected time).

See Also

- Create a new bookings schedule

- View a Booking Schedule

- Modify an existing schedule

   - Change the Fees to be charged for one or more Times

- [Change who may book one or more Times](#)

- [Mark Times as unavailable](#)

- [Change when Times may be booked](#)

- [Change the maximum number of Players that may book a Time](#)

- [Add an additional Time to the start or end of the schedule](#)

- [Change options, discount schemes and web site notice](#)

- [Stop a schedule showing on Fixture Lists](#)

- [Limit number of bookings a member may request](#)

- [View a different schedule](#)

- [Delete a bookings schedule](#)

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- [Record a Group Booking](#)

- [View a Booking received](#)

- [Create a receipt for a Booking](#)

- [Cancel a Booking](#)

- [Create a report of a schedule and its bookings](#)

16.2.4.20 Change options, discount schemes and web site Notice

The Bookings facility is available in the Gold editions of HandicapMaster

To change options, discount schemes accepted and the web site public notice for an existing schedule

1. [View the applicable Schedule](#).

2. Click the **Config** button on the toolbar above the list of times.

3. Adjust options, discount schemes and notice as required. Click **OK**.

To change the web site notice for one or more existing schedules

1. On the left hand task pane, select **Bookings** place.

2. On the right hand pane, double-click **Bookings**.

3. Right-click over a selected schedule and click **Change Public Notice** in the pop-up menu.

3. Enter the new message to be displayed on the booking pages and click **OK**.

4. Choose the range of dates to apply the change to and click **OK**.

See also

- [Create a new bookings schedule](#)

- View a Booking Schedule

- Modify an existing schedule

  - Change the Fees to be charged for one or more Times

  - Change who may book one or more Times

  - Mark Times as unavailable

  - Change when Times may be booked

  - Change the maximum number of Players that may book a Time

  - Add an additional Time to the start or end of the schedule

  - Create Duplicate Booking for times

  - Stop a schedule showing on Fixture Lists

  - Limit number of bookings a member may request

  - View a different schedule

- Delete a bookings schedule

- Record a Booking

- Record a Group Booking

- View a Booking received

- Create a receipt for a Booking

- Cancel a Booking

- Create a report of a schedule and its bookings

16.2.4.21 Stop a schedule showing on Fixture Lists

The Bookings facility is available in the Gold editions of HandicapMaster

To stop a General Booking schedule from being included on Fixture Lists (Report and Master Scoreboard website)

1. View the applicable Schedule.

2. Click the **Config** button on the toolbar above the list of times.

3. Select the **General** tab.

4. Un-tick the **Include on Fixture Lists** box to stop this schedule showing when creating a Fixture List report and when publishing to Master Scoreboard website. Click **OK**.

Notes:

- Repeat this action to reverse whether HandicapMaster will include the Booking in Fixture List reports.

See Also

- Create a Fixture List

- Export Fixture List to CSV file (for Google Calendar)

- Create a new bookings schedule

- View a Booking Schedule

- Modify an existing schedule

  - Change the Fees to be charged for one or more Times

  - Change who may book one or more Times

  - Mark Times as unavailable

  - Change when Times may be booked

  - Change the maximum number of Players that may book a Time

  - Add an additional Time to the start or end of the schedule

  - Create Duplicate Booking for times

  - Change options, discount schemes and web site notice

  - Limit number of bookings a member may request

  - View a different schedule

- Delete a bookings schedule

- Record a Booking

- Record a Group Booking

- View a Booking received

- Create a receipt for a Booking

- Cancel a Booking

- Create a report of a schedule and its bookings

16.2.4.22 Limit number of bookings a member may request

You may limit the number of future-dated bookings a member may hold for a selected facility at any one time.

Note: Members may book for the current day without it counting towards this limit or this limit being invoked.

To limit the number of bookings a member may book

1. On the left hand task pane, select **Bookings** place.

2. On the right hand pane, double-click **General Bookings Facilities**.

3. Double-click the facility in the list that you wish to set or change the limit..

4. Modify the details of the Facility and click **OK**.

See also

- [Create a new bookings schedule](#)

- [View a Booking Schedule](#)

- [Modify an existing schedule](#)

    - [Change the Fees to be charged for one or more Times](#)

    - [Change who may book one or more Times](#)

    - [Mark Times as unavailable](#)

    - [Change when Times may be booked](#)

    - [Change the maximum number of Players that may book a Time](#)

    - [Add an additional Time to the start or end of the schedule](#)

    - [Create Duplicate Booking for times](#)

    - [Change options, discount schemes and web site notice](#)

    - [Stop a schedule showing on Fixture Lists](#)

    - [View a different schedule](#)

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- [Cancel a Booking](#)

- [Create a report of a schedule and its bookings](#)

16.2.4.23 View a different schedule

> The Bookings facility is available in the Gold editions of HandicapMaster

When [viewing a General Bookings schedule](#) you may change to a different schedule for a different day or different facility.

To view a schedule for a different day (same facility)

1. Do one of the following:

    - Click the **Show Bookings for Previous day** or **Show Bookings for Next day** buttons (shown as arrows on green buttons) on the toolbar above the current schedule, or

    - Click the **Change** button on the toolbar above the current schedule and select a new date.

To view a schedule for a different facility

1. Click the **Change** button on the toolbar above the current schedule and select a new facility and date.

See Also

- [Create a new bookings schedule](#)

- [View a Booking Schedule](#)

- [Modify an existing schedule](#)

  - [Change the Fees to be charged for one or more Times](#)

  - [Change who may book one or more Times](#)

  - [Mark Times as unavailable](#)

  - [Change when Times may be booked](#)

  - [Change the maximum number of Players that may book a Time](#)

  - [Add an additional Time to the start or end of the schedule](#)

  - [Create Duplicate Booking for times](#)

  - [Change options, discount schemes and web site notice](#)

  - [Stop a schedule showing on Fixture Lists](#)

  - [Limit number of bookings a member may request](#)

- [Delete a bookings schedule](#)

- [Record a Booking](#)

- [Record a Group Booking](#)

- [View a Booking received](#)

- [Create a receipt for a Booking](#)

- [Cancel a Booking](#)

- [Create a report of a schedule and its bookings](#)

16.2.4.24 View a summary list of bookings

The Bookings facility is available in the Gold editions of HandicapMaster

To create a list of bookings for a range of dates

1. In the Places list, click **Bookings**. Then, on the right-hand side, under the **Analysis** section, double-click double-click **Summary of Bookings**

2. In the **List of of Bookings** box, select the Facility that you wish to to produce a list of bookings summary..

3. In the **From** and **To** boxes, enter the range of dates that you wish to list the bookings from the schedules for. All dates between the From and To dates (inclusive) will be included in the list..

Notes

- If the selected facility and date range has no bookings 'No Records Found' is displayed.

16.3 Group Bookings

16.3.1 Introduction

The Bookings facility is available in the Gold editions of HandicapMaster

The *Group Bookings* facility enables you to manage Golf and Clubhouse bookings. For example, bookings received from Golf Societies may be recorded and managed, including Food reservations and Function Room reservations.

You may record bookings for golf, recording number of players, number of tee times, times of play and number of Buggies pre-booked.

You may also record bookings for food and refreshments, as well as bookings for function rooms.

Bookings recorded may be tracked on a Calendar view for quick analysis, much like a Diary. You may also add ad-hoc notes to the Calendar using Calendar Notes.

Contents

- Record a Group Booking

- Modify a Group Booking

- Update payment status for Group Booking

- Delete a Group Booking

- The Group Bookings Wizard

- Create a booking confirmation report

- Create a report of Catering reservations

- Create a copy of (duplicate) a Group Booking

- Stop a Group Booking showing on Fixture Lists

See Also

- Calendar Notes

- Create a Fixture List

- Export Fixture List to CSV file (for Google Calendar)

16.3.2 Record a Group Booking

The Bookings facility is available in the Gold editions of HandicapMaster

To record a new Group Booking

1. On the Left Hand Task Pane, select **Bookings** place.

2. On the right hand pane, do one of the following:

- Double-click **Calendar**, select the applicable date in the calendar and then click the **Group Bookings** button on the toolbar, or

- Double-click **Group Bookings** and then in the left hand pane, click **New Booking**.

3. Record the Booking using the [Group Booking wizard](#).

To record a Group Booking (whilst viewing a General Bookings schedule)

1. [View the applicable Schedule](#).

2. Highlight the group of times to be booked by dragging the mouse cursor through the applicable times.

3. Do one of the following:

   - Click the **Group Booking** button on the toolbar above the list, or

   - Right-click over the times and select **New Group Booking** in the pop-up menu.

4. Record the Booking using the [Group Booking wizard](#).

16.3.3 Modify a Group Booking

The Bookings facility is available in the Gold editions of HandicapMaster

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To modify a Group Booking

1. On the Left Hand Task Pane, select **Bookings** place.

2. On the right hand pane, do one of the following:

   - Double-click **Calendar**, select the applicable date in the calendar and then click the link to the group booking, or

   - Double-click **Group Bookings** and then double-click the applicable booking in the list.

3. Edit the Booking using the [Group Booking wizard](#).

16.3.4 Update payment status for Group Booking

The Bookings facility is available in the Gold editions of HandicapMaster

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To update the payment status of a Group Booking after receiving payment

1. On the Left Hand Task Pane, select **Bookings** place.

2. On the right hand pane, double-click **Group Bookings.**

3. Do one of the following:

   - Click the applicable booking in the list and then, in the left hand column, click **Update Payment Status**.

   - Right-click over the applicable booking in the list, then select **Update Payment Status** in the pop-up menu.

16.3.5   Delete a Group Booking

The Bookings facility is available in the Gold editions of HandicapMaster

To delete a Group Booking

1. On the Left Hand Task Pane, select **Bookings** place.

2. On the right hand pane, double-click **Group Bookings.**

3. Do one of the following:

    - Click the applicable booking in the list and then, in the left hand column, click **Delete a Booking**.

    - Right-click over the applicable booking in the list, then select **Delete Group Booking** in the pop-up menu.

16.3.6   The Group Bookings Wizard

The Bookings facility is available in the Gold editions of HandicapMaster

The Group Bookings Wizard steps through the stages of recording a Golf or Clubhouse booking, such as from a Golf Society.

Booking Details

1. In the **Organisation** box, enter the name of the group placing the booking (for example, the name of the Golf Society).

2. In the **Is Booking** section, tick the items that will make up the booking.

3. In the **For Date** box, select the date of the booking.

Details of who has placed the booking

4. In the **Name** box, enter the name of the person placing the booking for the group.

5. In the **Telephone** box, enter this person's telephone number, if known.

6. In the **E-mail Address** box, enter this person's email address, if known.

Golf

7. In the **Number of Players** box, enter the number of players that this group is booking.

8. Click the **Set Green Fees** button to record a charge for the golf (i.e. Green Fees).

9. In the **Number of Tee Times** box, enter the number of Tee Times being reserved for this group booking.

10. In the **Number of Buggies** box, record the number of Golf Buggies that are being pre-ordered with this booking.

11. If one or more buggies are being ordered, click the **Set Buggy Fees** button to record a charge for the buggies.

12. In the **First Tee Time** and **Last Tee Time** boxes, enter the range of times being reserved for this group.

13. In the **Reserve Times for this group in General Bookings schedule, that uses Facility** list, select the facility this booking relates to (if you are using General Bookings). This will have the effect of automatically reserving times in the General Bookings for this group booking.

Green Fee Charges

14. Confirm that the charges for Green Fees and associated golf elements of the booking are correct.

- To add additional fee items (for example, adding a charge for 'Prizes'), click **Add** button.

- To edit a fee listed, double-click the fee item in the list.

- To delete a fee listed, highlight the fee in the list with a single click. Then click **Remove** button.

Catering

15. In the **Catering Notes** box, enter any notes relating to food and refreshments.

Catering Charges

16. Click the **Add** button to add any charges for Food and Refreshments.

- To edit a fee listed, double-click the fee item in the list.

- To delete a fee listed, highlight the fee in the list with a single click. Then click Remove button.

Function Room Charges

17. Click the **Add** button to add any charges for Room Bookings.

- To edit a fee listed, double-click the fee item in the list.

- To delete a fee listed, highlight the fee in the list with a single click. Then click Remove button.

Notes

18. In the **Notes** box, enter any general notes about this booking.

Payment Details

19. In the **Deposit** box, enter any amount that is due for payment by the customer to secure the booking.

20. In the **Status** list, select the current status of payment for this booking.

21. Tick the **Include on Fixture Lists** box if you wish this booking to show when creating a Fixture List report and when publishing to Master Scoreboard website.

22. Click **Finish** button to save the booking details.

16.3.7   Create a booking confirmation report

The Bookings facility is available in the Gold editions of HandicapMaster

To create a 'Confirmation of Reservation' report for a Group Booking

1. On the Left Hand Task Pane, select **Bookings** place.

2. On the right hand pane, double-click **Group Bookings.**

3. Do one of the following:

- Click the applicable booking in the list and then, in the left hand column, click **Report (Confirmation of Reservation)**.

- Right-click over the applicable booking in the list, then select **Report (Confirmation of Reservation)** in the pop-up menu.

16.3.8 Create a report of Catering reservations

The Bookings facility is available in the Gold editions of HandicapMaster

To create a report of forthcoming catering reservations for Group Bookings

1. Do one of the following:

a) On the Left Hand Task Pane, select **Bookings** place.

b) On the right hand pane, double-click **Group Bookings.**

c) In the left hand column, click **Report (Catering)** task.

or

a) On the Left Hand Task Pane, select **Reports** place.

b) Above the list of reports, select **Bookings** tab.

c) In the list of reports, double-click **Catering**.

2. In the **Restrict report to entries dated** box**,** choose the time period to be covered by the report. Click **OK**.

16.3.9 Create a copy of (duplicate) a Group Booking

The Bookings facility is available in the Gold editions of HandicapMaster

To create a copy of an existing Group Booking

1. On the Left Hand Task Pane, select **Bookings** place.

2. On the right hand pane, double-click **Group Bookings**.

3. Right-click over the applicable Booking in the list, then select **Create Copy** in the pop-up menu.

4. Select a **Date** for the new copy. Click **OK**.

16.3.10 Stop a Group Booking showing on Fixture Lists

The Bookings facility is available in the Gold editions of HandicapMaster

To stop a Booking from being included on Fixture Lists (Report and Master Scoreboard website)

1.   Do one of the following:

- Edit the Booking and, on the last page of the wizard, untick **Include on Fixture Lists** box, or

- On the Left Hand Task Pane..

1. Select **Bookings** place

2. Double-click **Group Bookings**

3. Select the Booking to be included or excluded from Fixture Lists and right-click.

4. On the pop-up menu, select **Fixture List**.

Notes:

- Repeat this action to reverse whether HandicapMaster will include the Booking in Fixture List reports.

See Also

- Create a Fixture List

- Export Fixture List to CSV file (for Google Calendar)

16.4   Calendar Notes

16.4.1   Introduction

The Bookings facility is available in the Gold editions of HandicapMaster

Calendar Notes are additional entries that you may add to the Bookings Calendar as memo's, etc.

These may cover any topic that you like and will be visible to all users that have access to the Bookings system. These may also be included on a Fixture List that you may create from the Calendar.

You may also record Golf Society, etc., bookings using the Group Bookings facility.

Contents

- Add a note to the Bookings Calendar
- Edit a note on the Bookings Calendar
- Remove a note from the Bookings Calendar
- Print a Calendar Note
- Create a copy of (i.e. duplicate) a note
- Stop a note showing on Fixture Lists

See Also

- Group Bookings
- Create a Fixture List
- Export Fixture List to CSV file (for Google Calendar)

16.4.2   Add a note to the Bookings Calendar

The Bookings facility is available in the Gold editions of HandicapMaster

To record a new Calendar Note

1. On the Left Hand Task Pane, select **Bookings** place.

2. On the right hand pane, do one of the following:

   - Double-click **Calendar**, select the applicable date in the calendar and then click the **New Calendar Note** button on the toolbar, or

   - Double-click **Calendar Notes** and then in the left hand pane, click **New Note**.

3. Record the Note, adding a **Title**, **Date** and **Details**.

4. Tick the **Include on Fixture Lists** box if you wish this note to show when creating a Fixture List report and when publishing to Master Scoreboard website.

5. Click **OK**.

16.4.3 Edit a note on the Bookings Calendar

The Bookings facility is available in the Gold editions of HandicapMaster

To modify an existing Calendar Note

1. On the Left Hand Task Pane, select **Bookings** place.

2. On the right hand pane, do one of the following:

   - Double-click **Calendar**, select the applicable date in the calendar and then click the entry for this note in the Calendar, or

   - Double-click **Calendar Notes** and then in the right hand pane, double-click the applicable Note.

3. Edit the Note, amending the **Title**, **Date, Details** and **Include on Fixture Lists** as applicable. Click **OK**.

16.4.4 Remove a note from the Bookings Calendar

The Bookings facility is available in the Gold editions of HandicapMaster

To delete a Calendar Note

1. On the Left Hand Task Pane, select **Bookings** place.

2. On the right hand pane, double-click **Calendar Notes**.

3. Do one of the following:

   - Click the applicable note in the list and then, in the left hand column, click **Delete a Note** task.

   - Right-click over the applicable note in the list, then select **Delete Note** in the pop-up menu.

16.4.5 Print a note

The Bookings facility is available in the Gold editions of HandicapMaster

To print the contents of a Calendar Note

1. On the Left Hand Task Pane, select **Bookings** place.

2. On the right hand pane, double-click **Calendar Notes**.

3. Do one of the following:

   - Click the applicable note in the list and then, in the left hand column, click **Report (Calendar Note)** task**.**

   - Right-click over the applicable note in the list, then select **Report (Calendar Note)** in the pop-up menu.

See Also

- Create a Fixture List

- Export Fixture List to CSV file (for Google Calendar)

16.4.6 Create a copy of (duplicate) a note

The Bookings facility is available in the Gold editions of HandicapMaster

To create a copy of an existing Calendar Note

1. On the Left Hand Task Pane, select **Bookings** place.

2. On the right hand pane, double-click **Calendar Notes**.

3. Right-click over the applicable note in the list, then select **Create Copy** in the pop-up menu.

4. Select a **Date** for the new copy. Click **OK**.

16.4.7 Stop a note showing on Fixture Lists

The Bookings facility is available in the Gold editions of HandicapMaster

To stop a Calendar Note being included on Fixture Lists (Report and Master Scoreboard website)

1. Do one of the following:

    - Edit the note and untick **Include on Fixture Lists** box, or
    - On the Left Hand Task Pane..

        1. Select **Bookings** place

        2. Double-click **Calendar Notes**

        3. Select the note to be included or excluded from Fixture Lists and right-click.

        4. On the pop-up menu, select **Fixture List**.

Notes:

- Repeat this action to reverse whether HandicapMaster will include the note in Fixture List reports.

See Also

- Create a Fixture List
- Export Fixture List to CSV file (for Google Calendar)

16.5   Configuring Booking Options

The Bookings facility is available in the Gold editions of HandicapMaster

To configure options relating to the Bookings facilities

1. Do one of the following:

   - On the **File** menu, click **Options**. Click **Bookings** tab, then **Configure Bookings** button.

   - In the Places list, click **Bookings**. Then, on the right-hand side, double-click **Settings.**

2. Configure the Booking Options.

16.6 Booking Options

The Bookings facility is available in the Gold editions of HandicapMaster

Competition Entry

Configuration

In the **Club E-mail Address** box, enter the primary e-mail address for your organisation. This e-mail address may be used for booking confirmation emails, when requested, and is required to complete the settings.

In the **Display Currency as** box, select the currency symbol you would like to use on the payment screens.

Members Competitions

In this section, you may configure how the booking pages for Member's competitions behave.

Players may cancel their bookings for future competitions
Tick this box if you wish to allow Players to be able to remove their names from bookings in future competitions, where they have previously booked in.

Players may cancel:

Online only (not through Player Entry in Clubhouse)
Tick this box if you wish to allow Players to be able to remove their names from bookings in future competitions, where they have previously booked in. Cancellations will only be available through Master Scoreboard i.e. online and not at the club.

Only if they originally made the booking (Singles competitions)
Tick this box if you wish to limit which players may cancel bookings to only those who made the original bookings (not those as friends also booked at the same time) in singles competitions.

Only if they originally made the booking (Team competitions)
Tick this box if you wish to limit which players may cancel bookings to only those who made the original bookings (not those as friends also booked at the same time) in team competitions.

When booking is cancelled by player:

Cancel all players from original booking (Singles competitions)
Tick this box if you wish all friends booked at the same time to be cancelled when any one of these players is cancelled form the bookings, in singles competitions.

Cancel all players from original booking (Team competitions)
Tick this box if you wish all team partners booked at the same time to be cancelled when any one of these players is cancelled form the bookings, in team competitions.

Opens

In this section, you may configure how the booking pages for Open Competitions behave.

Click the **Introduction Text** button to change the text displayed on the initial Open Competitions booking page.

Click the **Terms and Conditions** button to change the booking terms and conditions text that customers must agree to when booking entry to an Open competition.

In the *When booking, require Visitors to provide their ...* section, tick **Address Details**, **Date of Birth** and/

or **Telephone Number** boxes if you wish to require players to provide this information when booking.

Tick the **Send booking confirmation e-mails** box to activate e-mails to the player booking and the club e-mail address when a player books into an Open.

General Bookings

In this section, you may configure how the booking pages for General Bookings operate.

Click the **Introduction Text** button to change the text displayed on the initial General Bookings booking page.

Click the **Terms and Conditions** button to change the booking terms and conditions text that customers must agree to when making a General Booking.

In the *When booking, require Visitors to provide their ...* section, tick **Address Details** and/or **Telephone Number** boxes if you wish to require players to provide this information when booking.

Tick the **Members must agree Booking Terms when booking** box if you wish members to also have to agree to the booking terms when booking.

Tick **Receive copy of Members' booking confirmation e-mails** to receive an e-mail confirmation when a Member books

Tick **Receive copy of Visitors' booking confirmation e-mails** to receive an e-mail confirmation when a Visitor books

NOTE: E-mail Notifications on Master Scoreboard for your organization must be enabled for e-mails to be received otherwise these settings are ignored.

In the *Golf Tee Booking* section, you may change the behaviour of HandicapMaster when the booking schedule is a Golf Tee Booking schedule.

Tick **When creating booking schedules, limit Times to daylight hours only** box if you wish HandicapMaster to avoid creating times to book that would result in players starting or ending in the dark. This may be useful so that you can create fewer bookings templates, as you will be able to use a template with early times, for example, even at the time of the year where there is a late sunrise.

    a) Enter the time after sunrise and time before sunset for the first and last times that may be created in the **Only create that are between X minutes after sunrise, and X minutes before sunset** boxes.

    b) in the **Based upon daylight hours for** list, select the nearest location to your course.

In the **When reserving times for Group Bookings and Competitions, also reserve any times within X minutes of the start and end of the reservation** box the number of minutes 'buffer' around group bookings and competition play that you would like the system to automatically reserve for you.

Discount Schemes

You may add, edit or delete discount schemes.

Stripe Payments

If you have previously linked HandicapMaster to a Stripe Account, you may clear this link by ticking **Delete STRIPE account** button.

16.7 Create a Fixture List report

The Bookings facility is available in the Gold editions of HandicapMaster

Using the Bookings Calendar, you may create a Fixture List from the entries you have added to the calendar.

You may create a Fixture List report (see below).

The Fixture List will also be published to Master Scoreboard automatically, covering the period from the publish date through to the end of the following year.

To create a Fixture List report

1. On the Left Hand Task Pane, select **Bookings** place.

2. On the right hand pane, double-click **Calendar**.

3. Do one of the following:

   - In the left hand column, click **Report (Fixture List)** task**.**

   - Click the *Create Fixture List Report* button on the Toolbar above the Calendar.

To add addition items to the Fixture List

You may add ad-hoc items to the Fixture List by creating Calender Notes.

See Also

- Export Fixture List to CSV file (for Google Calendar)

- Stop a future competition being included in a Fixture List

- Stop a Group Booking being included in a Fixture List

- Stop a Calendar Note being included in a Fixture List

16.8 Export Fixture List (for Google Calendar)

The Bookings facility is available in the Gold editions of HandicapMaster

Using the Bookings Calendar, you may create a Fixture List from the entries you have added to the calendar.

You may export the Fixture List contents to a Comma-separated File ("CSV" file) for importing into Google Calendar (for example).

The Fixture List will also be published to Master Scoreboard automatically, covering the period from the publish date through to the end of the following year.

To Export the Fixture List to CSV File for Google Calendar

1. On the Left Hand Task Pane, select **Bookings** place.

2. On the right hand pane, double-click **Calendar**.

3. In the left hand column, click **Export (Fixture List)** task**.**

To add addition items to the Fixture List

You may add ad-hoc items to the Fixture List by creating Calender Notes.

See Also

- Create a Fixture List report
- Stop a future competition being included in a Fixture List
- Stop a Group Booking being included in a Fixture List
- Stop a Calendar Note being included in a Fixture List

16.9 Report of Member Bookings

To create a report of member Bookings

1. Do one of the following:

- In the Places list, click **Reports**. Then, on the right-hand side, under the **Analysis** section, double-click double-click **Bookings by member(s).**

- In the Places list, click **Bookings**. Then, on the right-hand side, under the **Analysis** section, double-click double-click **Report Bookings by member(s).**

2. Select one or more members and Click OK.

16.10 Accepting Discount Cards and Vouchers

16.10.1 Introduction

The Bookings facility is available in the Gold editions of HandicapMaster

With *Discount Schemes*, you may enable customers to pay discounted rates for bookings made online through the General Bookings facility or Open Competitions Entry.

Examples of discount schemes are 2-for-1 vouchers, County Cards, etc.

You can choose which schemes to offer and decide which booking schedules these will apply to. You may configure up to ten discount schemes to any one General Bookings schedule, or Open Competition.

Each Discount Scheme that you create may offer one of two types of discount; either

a) A percentage reduction off the published price, or

b) A specific price for that booking.

Contents

- Configuring Discount Schemes

- Adding, editing and deleting Discount Schemes

16.10.2 Configuring Discount Schemes

The Bookings facility is available in the Gold editions of HandicapMaster

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To add, edit or delete Discount Schemes

1. On the left hand task pane, select **Bookings** place.

2. On the right hand pane, double-click **Bookings** (in the General Bookings section).

3. In the left-hand column, click **Settings**.

4. Click **Discount Schemes** tab.

5. Add, edit or delete Schemes as required.

16.10.3 Adding, editing and deleting Discount Schemes

The Bookings facility is available in the Gold editions of HandicapMaster

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To add a new Discount Scheme

1. Display the **Configure Bookings Options** window.

2. Do one of the following:

   - Click **Add** button

   - Press the INSERT key on your keyboard.

3. Enter the details of the scheme.

<div style="background:yellow">**To edit an existing Discount Scheme**</div>

1. Display the **Configure Bookings Options** window.

2. Do one of the following:

   - Double-click the scheme in the list

   - Highlight the scheme in the list and click **Edit** button..

3. Enter the details of the scheme.

<div style="background:yellow">**To delete an existing Discount Scheme**</div>

1. Display the **Configure Bookings Options** window.

2. highlight the scheme in the list with a single click.

3. Do one of the following:

   - Click **Delete** button.

   - Press the DELETE key on your keyboard.

16.10.4 The Discount Scheme Form

The Bookings facility is available in the Gold editions of HandicapMaster

The Discount Scheme form enables you to enter the details of a discount scheme, such as 2-for-1, etc.

1. In the **Title of Discount Scheme** box, enter a suitable title or name for this scheme. This is the wording that will be displayed to customers on the booking pages.
   Examples might be:

   - Cheshire County Card

   - 2FORE1 Voucher

   - The Herald Newspaper Voucher

2. In the **Description** box, enter a description of this scheme (optional). This is for internal use only.

3. Enter the discount offered for this scheme. Do one of the following:

   - If the discount is a percentage off the normal price, select **Reduction from normal fee** and enter the percentage discount offered. For example, if the Voucher entitles the bearer to receive a 20% reduction in price, enter 20.

   - If the discount is to a fixed price, select **A fixed rate** and enter the applicable rate.

4. In the **Number of people this Voucher/Card applies to** box, select either

   - **1** if this discount relates to a single individual (E.g. County Card, etc.)

   - **2** if this discount relates to two players booking (E,g. a 2-for-1 offer).

16.11 Receive Payment for Bookings Online (Stripe)

16.11.1 Introduction

The Bookings facility is available in the Gold editions of HandicapMaster

Receive Payment for Bookings placed online

You may receive payment for bookings made for Open Competitions and General Bookings, using the services of **Stripe**. Stripe provide online payment services for many businesses online.

https://www.stripe.com

You do not need an online Merchant account. Rather, upon application to Stripe through the HandicapMaster app, you are then able to receive payment from bookings directly into a Bank Account.

There are no set-up fees or subscription fees for this service. Rather, a small per-transaction 'Booking Fee' is deducted from each transaction - effectively a Pay-as-you-go service with no upfront charges.

Once you have created a Stripe account, you are immediately able to request payment for entry into Open Competitions online through Master Scoreboard and also payment for General Bookings online.

Each Monday, any funds collected in the preceding week are then transferred directly into your nominated bank account.

Prerequisites for the Online Payment service

You will need a *Gold* edition of HandicapMaster to operate the Bookings system.

You will also need an active Master Scoreboard account and have configured this for *Individual Passwords* access.

Contents

- Create an account with Stripe
- View your Stripe account dashboard
- View Payments received
- Refund a Payment
- Delete your Stripe Connected Account

16.11.2 Create an account with Stripe

Accounts are called *Connected Accounts,* since these accounts are *connected* to the HandicapMaster service.

To create an account with Stripe

1. On the left hand task pane, select **Bookings** place.

2. On the right hand pane, double-click **Receive Payments through Stripe** (in the Payment Centre section).

3. Click **Next >**.

4. If your organisation already holds an account with Stripe, answer **Yes** to **Does your organisation already hold an account with Stripe?**.

5. Click **Next >**.

6. In the **Location** list, select your country location. If your country is not listed, please contact HandicapMaster support.

7. In the **Currency** list, select the currency of your nominated bank account.

8. In the **Club E-mail Address** box, enter the email address to be used for booking notifications, etc. if you have an existing Stripe account then enter the e-mail address associated with that account.

9. If you have an existing Stripe account then

   a. Click **Link STRIPE account** button. You will now be taken to the Stripe website and asked to confirm your existing Stripe account. Once you have completed this, you will be taken to a confirmation page on the Master Scoreboard website.

   b. The Master Scoreboard confirmation page will display an Account ID. Click **Copy** to copy this value into your Clipboard.

   c. Return to HandicapMaster and **paste** the Account ID into the **Account ID** box. Click **Finish.**

10. If you do not have an existing Stripe account then

   a. Click **Create STRIPE account** button. You will now be taken to the Stripe website and asked to fill out some details about your organisation (Name, Ownership, Account details, etc), where you do not have an existing Stripe account that you are using. Once you have completed this, you will be taken to a confirmation page on the Master Scoreboard website.

   IMPORTANT NOTE: If your organisation is **NOT** a Limited Company, or a Charity then please select either:

   Non-profit > Unincorporated Association

   Or

   Individual/Sole Trader

   If you select Limited Company or Charity you will need to provide your Company or Charity Registration Number.

You are now ready to collect payment for bookings through Master Scoreboard. You may have to complete additional Stripe sign-up requirements before Stripe will pay collected money to your account.

Completing the Stripe account set-up

After account set-up, please check whether Stripe requires additional information before being able to deposit money collected into your nominated account.

1. On the left hand task pane, select **Bookings** place.

2. On the right hand pane, double-click **Stripe Dashboard** (in the Payment Centre section).

You will be taken to the Stripe website and will be able to check if further information is required by Stripe.

See Also

- View your Stripe account dashboard

- View Payments received

- Refund a Payment

- Delete your Stripe Connected Account

16.11.3 View your Stripe account dashboard

Stripe provide a customer *Dashboard*, where you can update account details and view payouts into your account, etc.

To view your Stripe account Dashboard

1. On the left hand task pane, select **Bookings** place.

2. On the right hand pane, double-click **Stripe Dashboard** (in the Payment Centre section).

You will be taken to the Stripe website and will be able to check if further information is required by Stripe.

Note:

This facility will only be available if your Stripe account is of type 'Express'. If you have an alternative account type, please use your usual method to log in.

See Also

- Create an account with Stripe

- View Payments received

- Refund a Payment

- Delete your Stripe Connected Account

16.11.4 View Payments Received

To view the payments received through Stripe

1. On the left hand task pane, select **Bookings** place.

2. On the right hand pane, double-click **Payments Received** (in the Payment Centre section).

See Also

- Create an account with Stripe

- View your Stripe account dashboard

- Refund a Payment

- Delete your Stripe Connected Account

16.11.5 Refund a Payment

To refund a customer payment

If you elect to cancel a player's entry into an open competition, you will be given the opportunity to also refund the payment to the customer.

You may also refund payments from the Payments Received list.

1. On the left hand task pane, select **Bookings** place.

2. On the right hand pane, double-click **Payments Received** (in the Payment Centre section).

3. Highlight the applicable payment to be refunded.

4. In the left-hand column, click the **Refund Payment** task (or press the DELETE key on your keyboard).

See Also

- Create an account with Stripe

- View your Stripe account dashboard

- View Payments received

- Delete your Stripe Connected Account

16.11.6 Delete your Stripe Connected Account

To delete your Stripe Connected Account

If you no longer require your Stripe Connected Account, you may delete it.

1. Do one of the following:

- On the **File** menu, click **Options**. Click **Bookings** tab, then **Configure Bookings** button.

- In the Places list, click **Bookings**. Then, on the right-hand side, double-click **Settings.**

2. Click **Stripe Payments** tab.

3. Click **Delete STRIPE account** button.

See Also

- Create an account with Stripe

- View your Stripe account dashboard

- View Payments received

- Refund a Payment

Chapter 17

The Player Entry System

17   The Player Entry System

17.1   Introduction

Running the public Player Entry system in HandicapMaster

HandicapMaster offers two alternatives for entering player's scores. These are

- the built-in Enter Scores windows available by clicking the **ENTER SCORES** button on the Toolbar, or

- the separate '**Player Entry**' system.

The built-in screens have been optimised for Competition Administrators to enter scores, providing options such as editing a scorecard already entered. The Player Entry system is designed for Player's to enter their own scores, typically at a publicly available PC.

This chapter discusses entering scores (and more) using the Player Entry system.

See Enter Scores for information about entering scores and managing competitions as a Competition Official.

The Player Entry System

The Player Entry system is designed to allow Players to enter their own scores into the Computer after a Competition, typically using a publicly-accessible Computer.

The Player Entry system adds support for a wide range of equipment to be used, including Keypads, Card Readers, Touch-sensitive screens, etc. A leader board is available, along with options such as printing scorecards as players prepare to play in a Competition.

In the Gold editions of HandicapMaster, the Player Entry system may also be used to ask players to book future competitions and more.

Contents

- Run the Player Entry System

- Change the way Player Entry system works

- Entry of Competition Scores

- Enter a card as 'Missing Card'

- Set Player Entry system to automatically login when starting

- Run a Leader board

- Change the choice of Profile used on a specific computer

- Add Visitors when they enter their National ID

17.2   Run the Player Entry System

1.   Do one of the following:

   - On the Windows Desktop, double-click the Player Entry Program Icon
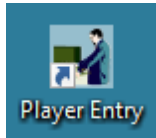
   - On the **Competitions** menu, click **Run Player Entry Program**

   - On the **Competitions** menu, click **Enter Scores**, then for an Opened Competition, click **Access** button on the toolbar.

   - Press the **F5** Function key on the Keyboard

2.   If you have more than one Player Entry profile, select the profile to be used. Tick the **Always use this choice on this computer** box for this selection to be remembered whenever Player Entry is started on the same computer. At a later date, you may change which profile is used on this computer.

3.   If you have dual monitor support or Scorecard Printer (with more than one device configured), select the applicable devices as prompted.

See Also

- Change the way Player Entry system works

- Automatic Login to the Player Entry System

- Setting a Password to Exit Player Entry

- Command line options when running Player Entry

- Run a Leader Board

- Change the choice of Profile used on a specific computer

17.3 Change the way Player Entry system works

It is possible to configure the way the Player Entry screens operate, and choose the equipment used.

To change how the Enter Scores screen works

1. On the left hand task pane, select **Competitions** place.

2. On the right hand pane, double-click **Settings Profiles**.

3. Do one of the following:

   - Select a Profile and press ENTER Key, or

   - Double-click the Profile entry in the list.

   - To add a new Profile, click **Create a new Profile** in the Player Entry Tasks list (or press the INSERT key).

4. Configure Player Entry using the Configure Player Entry Wizard.

17.4   The Configure Player Entry Wizard

The Configure Player Entry Wizard allows the behaviour of the Player Entry screens to be changed.

Title of Profile

In the **Name** box, enter a suitable name for this settings profile. Examples may be "Pro Shop", "Locker Room", etc.

In the **Description** box, enter a suitable description for the use of this profile, to help with indexing different profiles.

Equipment

In the **Players will use which device?** list, choose the equipment you wish to use. This may be a Standard Keyboard, Keypad, Terminal or Touchscreen, for example.

Tick the **Use Magnetic Card Reader** box (*) if you would like players to be selectable using Magnetic Swipe Cards.

Magnetic Card Reader

If using a Magnetic Card Reader (and the **Use Magnetic Card Reader** box was ticked on the Equipment page), enter the settings required for Magnetic Swipe Cards. These will depend upon the equipment and cards being used. Please contact support for further help.

Identify Players

In the **Members will identify themselves by** box, choose whether members will be selected by List, PIN number, Club Membership number, National ID's or Swipe Cards, etc.

In the **Visitors will identify themselves by** box, choose how Visitors shall identify themselves.

In the **Players will identify their Playing Partners by** list, choose whether players shall use a list of names, PIN numbers, etc to select their Playing Partners.

Services

Tick the **Sign In** box if you wish players to be able to sign in to competitions before play through the Player Entry screens.

Tick the **Enter Scores** box if you wish players to be able to enter their competition scores (along with options for displaying a Leader board, etc) through the Player Entry screens.

Tick the **Knock-Out Matches** box if you wish players to be able to view handicapping information and enter the results of their matches in match-play knock-out competitions through the Player Entry screens.

Tick the **Book into Future Competitions** box (*) if you wish players to be able to book into forthcoming competitions through the Player Entry screens. See also Global Options.

Tick the **View Information** (*) box if you wish players to be able to view information about their scoring and view a Handicap List through the Player Entry screens. If you choose to offer the Information services, you may then choose which services to offer:

- **My Golf**
  Tick this box to offer the option for players to check their own (current) Handicap, view the upcoming competitions they have booked into and view the recent entries in their playing record.

- **Handicap List**
  Tick this box to offer the option for players to view a full listing of handicaps of all members.

- **My Account or My Subscription Account** (Note: This item is only available when the Subscriptions Option has been installed as a licenced option.)
  Tick this box to offer the option for players to view their Subscription account balance and recent transactions.

- **My Competition Fees**   (Note: This item is only available when the Subscriptions Option has been installed as a licenced option and the <u>Competition fee purse</u> has been enabled)
  Tick this box to offer the option for players to view their competition fee balance and recent transactions

Tick the **Run an external program** (*) box if you wish players to be able to run a program outside of this system, such as an external booking system, for example. Player Entry will stop and wait for the external program to complete before continuing, When ticked, supply the following information:

Screen Title	Enter a description for this option to be displayed on the Player Entry screen (maximum 30 characters). Required.
Program to Execute	Enter the full path and file name of the external program to be run. E.g. "C:\MyFolder\MyProgram.exe". Required.
Program Parameters	Enter any runtime (e.g. "Command Line") parameters to be passed to the external program. Optional.
Window Start-up	Select how windows should create the initial window when it starts this external program.

Notes:

1. You may offer a button to minimise the Player Entry screens down to one small window, by selecting the **Run an external program service** and entering the **Program to Execute** as "SMALL-WINDOW". In this configuration, **Program Parameters** and **Window Start-up** settings are not used.

2. You may offer a button that exits Player Entry and restarts Player Entry using an alternative database instance. To do this, select **Run an external program service**. Then enter the **Program to Execute** as "SWITCH" (without the quotes) and the database instance name in **Program Parameters** box. .
   For example, if you have two databases configured to HandicapMaster called "Men" and "Ladies", you could configure the player entry profile in the Men's database with **Program Parameters** entered as *Ladies*. When a player selects this option, Player Entry will restart using the Ladies database instance.
   This button will be displayed on the front ("Members/Visitors") screen.
   Note: This will only switch to the other database instance if Player Entry has been started from its own desktop Icon (i.e. PlayerEntry.exe program run), not if started from within the HandicapMaster program.

Tick the **My Tee Handicap** box if you wish players to be able to request their Tee Handicap, without needing to sign in for a General Play or Competition score. If you select this as the only service offered, you can create a <u>dedicated Kiosk for calculating Tee Handicap</u>. Course scorecards linked to the 'system home club' are used for this service.

Options

Tick the **Allow Switching between list of names and PIN numbers** box if you wish players to be able to switch between List and PIN number entry. This may be helpful where PIN numbers are being used and a player has forgotten their PIN number.

Tick the **Show current handicaps in list of names** box if you wish HandicapMaster to include player's current Handicaps alongside their names in the Enter Scores selection list. (May not be available in all

regions due to regulatory restrictions.)

Tick the **Show Male/Female symbols alongside competition names** box if you wish HandicapMaster to display a Male, Female or both Male and Female icon alongside competition names, when a list of competitions is displayed for selection. The Icons will indicate whether the competition is open to Male and/or Female entrants.

Tick the **Turn on NUMLOCK key when entering numbers** box, if using a Keyboard or Keypad and you wish to ensure the Numlock key is on each time a number is to be entered.

Tick the **Enable Logging (troubleshooting)** box if you wish HandicapMaster to log the messages issued to Players at Score Entry Time to be logged to a file called "ScoresEntered.txt". This file is located here.

Tick the **Ask for confirmation from player when offering optional competition fees** (*) box if you wish players to confirm which optional competition fees they have chosen to enter when signing in.

Tick the **Show confirmation message when scores are entered** box if you wish a 'Your Score has been recorded' confirmation message to be displayed when a score is successfully entered.

Tick the **Players must identify who marked their card (Competitions)** box if you wish players to record the player who marked their scorecard (in competition play).

Tick the **Allow players to record KO match results as 'Other' or 'No Report'** box if you wish to allow your members to be able to enter a result of 'Other' or 'No Report' when reporting Match-play Knock-out match results.

Enter the minimum number of minutes that must pass between the time a player signs in and the time they may enter their score card in the **Minutes (minimum) between sign-in and score entry** box.

Tick the **Use callback to external system as players Book/Sign-in** box to configure HandicapMaster to communicate to an external system (such as a Bar Till system for competition fee processing) when players sign-in to (or book) a competition. For information about available 'callback' facilities, please contact HandicapMaster support staff.

General Play Scores (Sign-in and Enter Scores services)

Tick the **Players may enter General Play scores** box (*) to enable players to be able to enter their General Play scores into the system.

Tick **Players must sign-in before play** box if you wish players to be required to sign in to the computer before they go out to play the General Play Score.

Tick one or both of the following options:

- **Men may enter scores**

- **Ladies may enter scores**

Tick **Players must identify who marked their card** box if you wish players to record the player who marked their scorecard (when recording General Play scores).

In the **Format** list, choose whether the scores will be scored as **Stableford** or **Regular Stroke Play**.

Note: Some Golf Union regulations make it mandatory to use Sign-in, and to make the format of scoring 'Regular Stroke Play'. In these cases, you will not be able to amend these settings.

On the next page:

In the **Players may play these courses to return General Play scores** list, tick the box alongside each course that it is OK for members to play to record their General Play scores.

On the next page:

in the **Players may play from these Tees** list, tick the box alongside each Tee colour that it is OK for members to play from when returning General Play scores. Selected Tee colours will only be offered to members if a course scorecard has been set up for their gender and for the chosen course and Tee colour.

Note: Some Golf Union regulations make it mandatory that all Home Courses and all Tees are made available to Players to return General Play scores. In these cases, you will not be offered these selections.

Competition Leader board (Enter Scores service)

Tick the **Show a leaderboard during idle time** box to display a competition leader board during idle moments. The leader board will display the players and scores for the round currently being entered. Combined scores from multiple round competitions are not supported. If the competition has been set up to be run within divisions, HandicapMaster will show the players split into their divisions.

In the **Seconds Idle Time required before Leaderboard is displayed** box, enter the time delay before the Leader board is displayed, from the last time a key was pressed. This time interval may be between 5 and 60 seconds inclusive.

In the **Seconds between each Scroll of Leaderboard** box, enter the time delay between each scroll of the Leader board. This time interval may be between 2 and 15 seconds inclusive.

Un-tick the **Display scores alongside names**, if you wish to prevent the players scores being displayed. This option will apply to both Player Entry and Master Scoreboard.

Tick the **Only show Leaderboard when one or more competitions are underway** box to limit when the Leader board is displayed. The leader board will only be displayed when one or more competitions selected to show on the leader board are underway (available for Sign-in or Score Entry).

Tick the **Only show Leaderboard after ...** box to limit when the Leader board is displayed. The leader board will only be displayed after a chosen time, on any day.

Tick the **Publish scores to Master Scoreboard when Leaderboard displayed** box if you would like the leader board scores to be sent to the Master Scoreboard website, for your members to view online. Please refer to notes about publishing the leader board to Master Scoreboard.

Tick the **Display Leaders only** box to configure the Leader board display. The leader board may be restricted to only 'good' scores.

Notes:
- In qualifying competitions the full Strokes Received is used (where applicable) for handicapping purposes but the Strokes Received is applied for competition ranking purposes only when the competition is closed. For this reason, scores displayed on the Leader board may be based on full handicap even when the competition is being played off a restricted handicap allowance.

- When the leader board is displayed on the screen, it is possible to hide the buttons alongside the leader board by pressing the F6 key (Function Key 6). Pressing this key again re-displays the buttons. By hiding the buttons, the display of the leader board when being fed through to a large display (such as a TV display) can be improved.

Print Score Cards or Labels (Sign In service)

Tick the **Print Score Cards or Labels as players sign in** box (*) if you would like to print the Competition Name, Player's Name, Player's Membership Number, Handicap, Strokes Received and Score Card Issue Number and a number of other items directly on to a Score Card (or a label) as players sign-in.

Identify whether you wish the printing to occur when players sign-in to competitions and/or when players sign in to return a General Play score, by ticking **Competitions** and/or **General Play** boxes. You must select at least one of these.

Click the **Font...** button to select the font to be used when printing.

Click the **Position Data on Scorecards** button to choose the positions where the information will be printed on the Scorecard/Label.

Select each item to be printed on the label. Tick **Include** to include this item when printing. Enter the distance from top left corner of the label (in Millimetres) to position the item, or drag and drop it on the example layout.

Tick the **Include Titling when printing** box if you would like titling to be added to the items included on the label to be printed. For Example with this option ticked, handicaps will be printed as "H'cap: 24" instead of "24", Strokes received will be printed "Strokes: 24" instead of "24" etc. This can improve the appearance when printing to Labels.

Click the **Perform a test print using Printer** link to print some test data to the selected printer.

Note: the Label designer window can be increased in size when using larger labels or if printing directly to score cards.

Click OK to save any changes to the design, or cancel to abandon any changes.

Link to External System

If using a callback to an external Accounting or Till system for fee deduction or the HandicapMaster Subscriptions Option, select the callback number in the **Use Callback** box.

Click **Configure Callback Settings** button to enter the callback parameters.

If fees are being deducted at sign in to a competition then there is an option to **Display Account Balance at sign in.**

Tick this if you wish members who successfully sign in to have their balance displayed in the sign in confirmation message.

Notes

- Callback parameters may also be configured through the HandicapMaster INI file in the users application data folder. When configured through the INI file, these take precedence over the settings in the Player Entry profile.

- Configuration of this facility is specific to the external Accounting or Till system. Please contact HandicapMaster Limited or your Accounting or Till (EPOS) system supplier for specific details.

- When using the HandicapMaster Subscriptions Option the account balance does not include any unprocessed competition fees. Competition fees when using the Subscriptions Option are only processed when the competition is closed.

Screen Colours and Language

Select the preferred **Colour Scheme** from the Colour Scheme list, to be used on screen.

You may choose the time that informational messages are displayed on the Player Entry screens by setting the number of seconds for the messages to be displayed in the **Display informational messages on screen for ... seconds** box (*). Players may clear the message early by pressing ENTER on the keyboard or tapping or clicking the message on screen.

Tick the **Allow display on secondary monitor (when available)** box (*) if you are likely to be running the Player Entry system on a computer with dual or multiple Monitors attached, and you would like the option to run the Player Entry screens on one of the alternative Monitors. When this option is ticked, and Player Entry is started, a check will be made for 2 or more monitors on the computer. If there are, you will be offered the choice of which Monitor to send the Player Entry screens to.

Finish

Click **Finish** to complete the Configure Player Entry Wizard and save the chosen settings.

Any copies of Player Entry which are currently running with this profile will automatically restart after a few minutes to use the latest settings.

Note:

(*) The following services and options are available in the Gold editions of HandicapMaster.
- Book into Future Competitions and
- View Information.
- Use Magnetic Card Reader,
- Print Score Cards as Players Sign In,
- Display informational messages on screen for ... seconds option and
- Allow secondary monitor.

17.5 Choose Competitors

The Enter Scores window is used to select the members who have been competitors in the competition, and to enter their scores.

To enter scores returned by competitors

1. Select a name from the list, or type their PIN of Club Membership number, or swipe their Card

2. Enter the scores for this competitor using the Score Entry window.

3. Repeat for all cards returned.

4. Click the **Administration** button to exit the Player Entry system.

TIPS:

- When selecting names from the List by Surname, it is possible to type the leading characters from the players' surname in order to locate the required player.

To change how the Enter Scores screen operates

1. The way the Enter Scores screen behaves may be configured using the Configure Player Entry wizard.

2. If you have more than one Player Entry profile configured, you may Change the choice of Profile used on a specific computer.

17.6   Entry of competitors scores

Competitors scores are entered using the Score Entry window.

To enter the scores for a competitor (or team)

1.   Check that the Handicap indicated in the Strokes Received box is correct for the competitor. Should this be a Stroke-play competition, the number of strokes can be adjusted to suit (such as when a competitor claims a lower handicap than that to which (s)he is entitled, or in a multi-round competition on a subsequent day when the conditions of competition require the player to play off the same handicap throughout and his handicap has changed as a result of an earlier round).

2.   Enter the player's scores hole-by-hole. The Net score, number of Stableford points or Par result for each hole are shown.

3.   Press ENTER or OK key to save the scores, as indicated by the Accept Score button.

Entering a Hole in One

Press **1** key followed by **ENTER** or **OK** key.

Entering a score for a hole over 9 strokes

Press **1** then the second digit. For example, to enter a score of 12, press the 1 key followed by 2.

Entering a No Return for a hole

If the player does not complete a hole, use the **ZERO** (0) or **FULL STOP** (.) key to enter a No Return.

Entering Hole Not Played for a hole

If the player does not start a hole, use the **SLASH** (/) key to record Hole Not Played.

To correct a mistake

Use the keys highlighted for MOVE UP and MOVE DOWN to correct previous holes entered, as indicated alongside the buttons on the right of the screen. Over-type a score with a revised number as appropriate.

17.7 Enter a Missing Card as 'No Return'

On some occasions, players do not return their Score Card to the Committee after play. Typically, these scores are reported as 'No Return' in the Competition Results, and in the player's Handicap Record.

To enter a missing card as 'No Return'

1.   Choose the applicable Player or Team using Enter Scores, in the same way as entering a card that has been returned.

2.   Enter every hole as **Did Not Play**.

HandicapMaster will confirm the score as 'Score not Entered'.

TIP

Provided at least one Hole has been entered onto the Score card, HandicapMaster will auto-complete any un-entered holes as NR when the Accept Score button is selected. Therefore to quickly enter a missing card for a Player, enter hole 1 as Did Not Play, then press Accept Score.

Automatic entry of missing cards as 'No Return'

Where the **Players to Sign In before play** option is used, it is not necessary to manually enter missing cards. HandicapMaster will automatically convert players who have signed in but not entered their score card to 'No Return' when the competition is closed using **Apply Scores**.

Note:

• The Players to Sign In before play option is only available in the Gold editions of HandicapMaster.

17.8 Requiring a password to start Player Entry System

The Player Entry program may be configured so that it always prompts for a HandicapMaster userid and password before it will start.

To set up Player Entry to request entry of a userid and password to start

Userid/Password login may be specified by passing a selected command line argument to Player Entry when starting the program. This can be achieved by the use of Windows Shortcuts.

The PlayerEntry program recognises the following Command Line switch for this purpose.

Switch **Function**
/login Request login on start-up.

1. Create a Windows Shortcut to PlayerEntry on the desktop.

2. Right-click over the desktop Icon and select 'Properties'.

3. Select the 'Shortcut' Tab and add the following text to the end of the 'Target' field: /login.

For example, to require PlayerEntry to be logged in to start, the shortcut may be set up like:

```
"C:\Program Files\HandicapMaster\PlayerEntry.exe" /login
```

Notes:

- Ths login prompt will only be displayed if logging into the main HandicapMaster program requires a password.

17.9   Setting a Password to exit Player Entry System

The Administration Button Password is the password that prevents exit from the Player Entry system.

It may be appropriate to set an Administration Button password if players are entering their own scores and the Computer is likely to be left unattended by Competition Officials.

Note

The Administration Button password is used by all Player Entry computers and is not a separate setting for each individual computer.

To set or change the Administration Button Password

1.   From the **Competition** menu, click **Administration Button Password**.

2.   In the **Old Password** box, type the current (existing) password, if one exists.

3.   In the **New Password** box, enter the new password.

4.   In the **Confirm New Password** box, repeat the new password.

5.   Click **OK**

Note

The following rules apply to Passwords:

- Passwords must be at least 4 characters long

- Any character, number or symbol can be used

- Passwords are not case-sensitive.

Default Password

When HandicapMaster is first installed, there is no password

To Remove (clear) the Administration Button Password

It is possible to reset or remove the password by:

1.   In the **Old Password** box, type the current (existing) password, if one exists.

2.   Clear (leave empty) the **New Password** and **Confirm New Password** boxes.

If you have lost the Password

In the event of a lost or forgotten password, please contact the supplier.

17.10 Command Line Options

The following command line options may be used with the Player Entry program ("PlayerEntry.exe"):

Switch	Function
/login	Require a HandicapMaster Userid/Password to start Player Entry.
/i \<iniFile>	Full path and filename of INI file (currently unused). May not contain any spaces in the path or file name.
	Defaults to "{app}\HandicapMaster.ini" (where {app} = app. path of this program).
/instance \<name>	When more than one database instance has been configured, start Player Entry using instance with name of \<name>.
	\<name> may not contain any spaces.
/nosplash	Skips display of the Player Entry banner ('splash') window on start-up.
/profile \<pname>	Use Player Entry settings profile with the name \<pname>.
	\<pname> may not contain any spaces, and therefore cannot work with any profile given a name containing spaces.
/monitor \<number>	Use monitor \<number> from the list of available monitors (when using a dual-monitor card, etc). 1 = The topmost monitor from the list offered when starting Player Entry, 2 = The second monitor from the top in the list, etc.
/U	Skip running any check for program updates on Start-up.
/F6	On first time start-up of the leader board display full width without the buttons alongside the leader board as if F6 has been pressed.
/sql-db \<catalog> \<database-name>	Directly starts Player Entry using SQL Server database technology defined with sql catalog \<catalog> and sql database name \<database-name>

For example, the following command line starts Player Entry for a database instance called "MensDatabase"..

```
"C:\Program Files\HandicapMaster\PlayerEntry.exe" /instance MensDatabase
```

17.11 Processing scores received through Player Entry

You may allow players to record their own scores using the Player Entry system.

To configure Player Entry so that your members may enter General Play Scores.

To enable your members to be able to enter their scores, you will need to configure an available Player Entry Settings Profile.

You may elect to require players to sign-in before play, if desirable (Gold only).

You may need to to define the Course and Tees that the players will play when recording their General Play Scores.(May not be available in all regions due to regulatory restrictions.)

When configured, the Player Entry system will show "General Play Score" as the last 'competition' in the **Enter a Score** section (and **Sign-in** section if applicable).

To enter a score when a player has signed in through Player Entry but not been able to submit the score through Player Entry

In some cases you may need to manually enter a players General Play Score after they have signed in, for example: where the player was unable to access the clubs terminal for some reason.

1. In the left hand column, select the **Handicapping** place.

2. In the right hand pane, double-click **General Play Scores (Signed In)**. Players who have signed in will be listed.

3. Double-click a name listed to enter this score.

To cancel a player signed in through Player Entry but not been able to submit the score

In some cases you may need to cancel the sign in for a General Play Score, for example the player retired injured.

1. In the left hand column, select the **Handicapping** place.

2. In the right hand pane, double-click **General Play Scores (Signed In)**. Players who have signed in will be listed.

3. Highlight the score with a single click, then

   - press the DELETE key on the keyboard.

   - right click and select **Cancel Sign-in**

See also

- Configuring Player Entry to allow players to enter their General Play Scores

17.12 Run a Leader Board

It is possible to configure the Player Entry screens to operate a running leader board for competitions that are currently underway.

To run a Leader board

On the left hand task pane, select **Competitions** place.

1. On the right hand pane, double-click **Settings Profiles**.

2. Do one of the following:

- Select a Profile and press ENTER Key, or

- Double-click the Profile entry in the list.

- To add a new Profile, click **Create a new Profile** in the Player Entry Tasks list (or press the INSERT key).

3. Configure Player Entry using the Configure Player Entry Wizard, setting the applicable settings for showing the Leader board.

Notes:

- For a competition to be displayed on the Leader board, the option **Show on Leaderboard** must be ticked in the configuration of the opened competition.

- If you have a multiple-round competition (such as a 36-hole competition), ensure that you set the aggregation of rounds with Open a New Competition for the second round. If you have already opened the second round, you may link the rounds by changing the way the opened competition is being played. You can also set an overall name for the competition.

- If the leader board is displaying the leading scores for a multiple-round competition, it will only show the scores for those players who have completed all rounds to date (i.e. all players with the maximum number of rounds so far completed).

- You may choose whether to show Net or Gross scores for a chosen competition when configuring an open competition (where the format of the competition is a singles Regular Stroke Play or Maximum Score competition).

- If displaying a leader board on the Player Entry computer the Windows Screen Saver will activate if configured.

- When the leader board is displayed on the screen, it is possible to hide the buttons alongside the leader board by pressing the F6 key (Function Key 6). Pressing this key again re-displays the buttons. By hiding the buttons, the display of the leader board when being fed through to a large display (such as a TV display) can be improved. This option can also be activated on start-up please see Command Line Options

- You may elect to have the leader board send the scores to the Master Scoreboard website, so that your members may view the live scoring online. Please refer to notes about publishing the leader board to Master Scoreboard.

- It is possible to hide the players scores by un-ticking the option **Display scores alongside names** in the Player Entry configuration Wizard.

17.13 Run a dedicated Kiosk for calculating Tee Handicap

It is possible to configure the Player Entry screens to operate as a dedicated kiosk to allow players to calculate their Tee Handicap before they play.

To run a dedicated kiosk allowing players to calculate their Tee Handicap

1. On the left hand task pane, select **Competitions** place.

2. On the right hand pane, double-click **Settings Profiles**.

3. Do one of the following:

    a) Select a Profile and press ENTER Key, or

    b) Double-click the Profile entry in the list.

    To add a new Profile, click **Create a new Profile** in the Player Entry Tasks list (or press the INSERT key).

4. Configure Player Entry using the Configure Player Entry Wizard. Select 'My Tee Handicap' as ***the only service selected***, on the 'services' page of the Configure Player Entry Wizard.

Notes

When 'My Tee Handicap' is the only service selected, the processing in Player Entry is amended as follows

1. A front screen, describing the purpose of the kiosk, is displayed.

2. The Administration button is hidden from the front screen.

3. The number of players signed-in or scores entered is not displayed.

4. Player Entry Messages are **not** displayed on the Kiosk.

17.14 Display Messages on the Player Entry Terminal

The Display Messages facility is available in the Gold of HandicapMaster

It is possible to configure the Player Entry screens to display one or more messages to your members when there are no competitions running.

These messages may contain formatted text, including different fonts and colours and may also include images such as clip art.

A sequence of messages may be displayed and the messages may also be defined to be displayed within a given range of dates (or all dates).

You may also configure different messages for separate Player Entry terminals.

Note: If you have a leader board configured to be displayed, this will be shown in place of any configured messages.

To create a message

1. In the main HandicapMaster program, in the left hand task pane, select **Competitions** place.

2. On the right hand pane, double-click **Messages**.

3. Do one of the following:

    - Click **Create a New Message** in the **Player Entry Messages Tasks**.

    - Press the INSERT key.

4. Enter the **Name** of this message.

5. Enter the **Message** text that you wish to display to members, the Font and colours may be adjusted using the tool bar

    Tip: Size the message text to fill the box on the screen. The message will be displayed in Player Entry as it shows in this box.

6. Select when you would like the message to be displayed:

    - **Display for all dates**, or

    - **Display from** (to display the message for a given range of dates; select the start and end dates you require).

    - **Don't display** (allows you to retain the message but prevent it being displayed, perhaps you have a message you wish to display when the course is closed, you would normally select the **Don't display** option and change this when the course is closed).

7. Select the Player Entry profile that will be used to display this message. This allow you to restrict the display of the message to only those computers running a specific Player Entry profile.

To edit an existing message

1. In the main HandicapMaster program, in the left hand task pane, select **Competitions** place.

2. On the right hand pane, double-click **Messages**.

3. Do one of the following:

    - Select a message and press ENTER Key, or

- Double-click the message entry in the list.

You may then edit the details as required.

Tip: Size the message text to fill the box on the screen. The message will be displayed in Player Entry as it shows in this box.

To delete a message

1. In the main HandicapMaster program, in the left hand task pane, select **Competitions** place.

2. On the right hand pane, double-click **Messages**.

3. Select a message in the list and do one of the following:

   - Click **Delete a Message** in the **Player Entry Messages Tasks**.

   - Press the DELETE key.

To create a message with a mixture of text and images

You may create a message with a mixture of text and images. To so this,

    a) Start Microsoft Word and create the message in Word, adding pictures as required.

    b) Select all of the document (text and pictures) and select EDIT, then COPY.

    c) In HandicapMaster, PASTE the message into the message box.

If the message is too large to fit into the message box, delete the contents and resize the message in Word. Then try again.

Notes:

- You may directly paste bitmap files (extension *.bmp) or Graphics Interchange Format (extension *. gif) or Joint Photographic Experts Group (extension .*.jpg , *.jpeg or *.jpe) or Portable Network Graphics (extension *.png). into the message.There is a variable size limit per image depending on the format used, if the image file is too large a message will be displayed.

Notes:

- If displaying messages to your members on the Player Entry computer the Windows Screen Saver will activate if configured.

- You may use the tool bar to adjust the colour of text , and adjust the alignment.

- You may mix fonts and colours within a message.

- The number of lines in the **Message** text box is the limit of the message that will be displayed on the Player Entry terminals.

- If you have multiple messages enabled either for a given date range or for all dates these messages will be displayed in rotation with short delay between each message

17.15 Change choice of Profile (and Label Printer) for a specific computer

If you have more than one Player Entry profile configured, you will be prompted to choose the profile to use when you start Player Entry. At this time, you may choose to **Always use this choice on this computer**.

If the label printing at sign in option has been selected in the Player Entry Profile then the choice of printer will also be displayed and you may choose to **Always use this choice on this computer**

At a later date, it is possible to reset this selection of profile so that an alternative profile and if appropriate an alternative label printer can be used on that computer.

To reset the choice of profile (and Printer) for a computer

To clear the automatic choice of Player Entry profile (and equipment) for a specific computer, do the following:

1. On the left hand task pane, select **Competitions** place.

2. On the right hand pane, double-click **Assignments**.

3. Do one of the following:

- Select the applicable computer and press DELETE Key, or

- Click **Clear an Assignment** in the **Assignment Tasks**.

When next starting Player Entry on the applicable computer, you will be able to choose which profile to use.

17.16 Adding Visitors

If HandicapMaster is linked to a handicapping service which allows it, Player Entry will automatically add a new Visitor to the HandicapMaster database using data from the handicapping service when a Visitor types their National ID or swipes a magnetic card with their National ID on it.

Chapter

18

Subscriptions, Invoices and Payments

18   Subscriptions, Invoices and Payments

18.1   Introduction

This is an option for HandicapMaster that allows your organization to manage membership subscriptions and issue subscription renewal letters, create invoices and record payments. It includes a number of reports to help you manage subscriptions and membership income. The membership option has been designed with the same look and feel of the HandicapMaster software.

In addition to the details in this help information there is a Quick Start guide to the Subscriptions option and a more detailed help document. These are available from the HandicapMaster website

Additional Subscriptions Option Documention

> Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

Subscriptions are designed around the concept of an annual subscription period with one or more payments in the period. By use of scheduled payments is it possible to manage overdue subscriptions and raise overdue letters, emails using the Overdue Subscriptions wizard.

Invoices can allow one off items to be raised against members and alter their balance. Examples would be a Bar levy.

Invoices may also be used for subscriptions where irregular payments are to be processed. Use in this manner some of the features specific to subscriptions such as overdue processing are not applicable.

Subscriptions and Invoices are designed to adjust a member's "account balance" by reducing the balance.

Payments recorded will also adjust a member's "account balance" by increasing the balance.

Competition Fees may also be processed by the Subscriptions Option. These will raise invoices and adjust a member's account balance.

A Transaction History facility allows all transactions for a member to be viewed

Recommended Use

Where an organization has a requirement for management of overdue subscriptions and has one or more subscription payments per annum then it is recommended that Subscriptions are used.

Note: Different members can have different payment schedules.

Where an organization has a subscription requirement for various payments at irregular periods through the year we recommend the use of an invoice rather than a subscription and then record Ad-hoc Payments as required.

Note: This will mean that it is not possible to automatically manage overdue subscriptions using the facilities within HandicapMaster but you are still able to view account balance details.

Contents

- Preparation

- Subscriptions

- Invoices

- Payments

See also

- Accounting Options

18.2 Preparation

18.2.1 Introduction

> Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

To manage subscriptions and invoices for members, HandicapMaster makes use of the concept of a "Template". Each Template consists of a list of Payment Items.

A Payment Item describes a billable item and its cost or charge.

Payment Categories allow you to group together Payment Items that are used to create a Template.

Methods of Payment define how a payment is made, a number of default value are defined may you may define additional ones.

To create a Template you choose the items required from a list of Payment Items.

Before the Payment Items are defined it is suggested that you customize the HandicapMaster Membership Option to your organization's requirements.

Contents

- Configure additional Methods of Payment

- Configure additional Payment Categories

- Configure Payment Item

See Also

- Configure Payment Options

- Create a Subscription Template

- Create an Invoice Template

18.2.2 Methods of Payment

> Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

Methods of Payment define how a payment is made to your organization by the payee. A number of initial values are defined.

To add a Method of Payment

1. On the **Accounting** menu click **Configure** and then click **Methods of Payment** item.

2. Click the **New** button and enter the new Method of Payment.

To edit a Method of Payment

1. On the **Accounting** menu click **Configure** and then click **Methods of Payment** item.

2. Click on the appropriate Method of Payment in the list to highlight it.

3. Click the **Edit** button and edit the name as required.

To delete a Method of payment

1. On the **Accounting** menu click **Configure** and then click **Methods of Payment** item.

2. Click on the appropriate Method of Payment in the list to highlight it.

3. Click the **Delete** button.

4. Confirm the deletion

Notes:

- It is not possible to delete the initially defined values, however they may be edited.

18.2.3 Payment Categories

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

Payment Categories allow you to group Payment Items together. A number of initial values are defined.

To add a Payment Category

1. On the **Accounting** menu click **Configure** and then click **Payment Categories** item.

2. Click the **New** button and enter the new Payment Category.

To edit a Payment Category

1. On the **Accounting** menu click **Configure** and then click **Payment Categories** item.

2. Click on the appropriate Payment Category in the list to highlight it.

3. Click the **Edit** button and edit the name as required.

To delete a Payment Category

1. On the **Accounting** menu click **Configure** and then click **Payment Categories** item.

2. Click on the appropriate Payment Category in the list to highlight it.

3. Click the **Delete** button.

4. Confirm the deletion

Notes:

- It is not possible to delete the initially defined values, however they may be edited.

18.2.4 Payment Items

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

Payment Items are used when you create a Subscription or Invoice Template. Payment Items consist of at least 3 elements:

- Payment Category

- Description

- Default Amount

To add a Payment Item

1. On the **Accounting** menu click **Configure** and then click **Add New Payment Item**.

2. Create a Payment Item using the Payment Item Window.

To edit a Payment Item

1. On the **Accounting** menu click **Configure** and then click **Edit Payment Item**.

2. Select a Payment Item in the list and click **OK**.

3. Edit the Payment Item using the Payment Item Window.

To delete a Payment Item

1. On the **Accounting** menu click **Configure** and then click **Delete Payment Item**.

2. Select a Payment Item in the list and click **OK**.

3. Confirm the deletion.

18.2.5 The Payment Item Window

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

The Payment Item window allows a Payment Item to be added or edited.

The Payment Item Window

1. In the **Payment Category** list click the appropriate Payment Category to highlight it.

2. In the **Description** box enter a suitable description for the Payment Item.

3. The **Notes** box may be used to record any details you wish to record.

4. In the **Net Amount** box enter the cost of this Payment Item.

5. Tick the **Add VAT** box to add VAT to the cost of the Payment Item.
    This is only visible if you have configured VAT.

18.2.6 Start Date of Current Accounting Year

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

It is possible to set the Start Date of the Accounting Year. This is used in various lists to restrict the information to items within the Current Accounting year.

To set the Start Date of the Accounting Year

1. On the **Accounting** menu select **Configure** and then select **Start Date of Current Accounting Year**.

2. Adjust the day and month as required.

Notes:

• The default value is 1st of January

18.3 Subscriptions

18.3.1 Introduction

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

To manage subscriptions for members, HandicapMaster makes use of the concept of a "Subscription Template".

Each "Subscription Template" consists of a list of Payment Items.

A Payment Item describes a billable item and its cost or charge.

This flexible approach allows you to define different templates for different memberships. A Subscription Template can be assigned to one or more members.

A Raise Subscription Wizard guides you through the process of raising membership Subscriptions.

Subscriptions are designed around the concept of an annual subscription period with one or more payments in the period. By use of scheduled payments is it possible to manage overdue subscriptions and raise overdue letters, emails using the Overdue Subscriptions wizard.

If you require irregular payments then please review the Invoices section of this document.

Note: some of the features specific to subscriptions such as overdue processing are not applicable when using Invoices to manage irregular payment subscriptions.

Contents

- Create a Subscription Template
- Assign a Subscription Template to a Member or Members
- Edit a Subscription Template
- Copy a Subscription Template
- Delete a Subscription Template
- Raise a Subscription
- View a Member's Subscription
- Amend Subscription Notes
- Find Overdue Subscriptions
- Reprint a Subscription Invoice
- Resend a Subscription Invoice by E-mail
- Raise an Overdue Subscription Invoice or Letter

18.3.2 Create a Subscription Template

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

> **To create a Subscription Template**

1. Do one of the following:

   - On the **Accounting** menu click **Subscriptions,** then **Set up a Template.**

   - On the [Task/Explorer tab](), click **Explorer** and then , then select the **Accounting** item and select **Subscription Templates.** On the list displayed right click with the mouse and select **Set up a Template**.

2. Create a Template using the [Subscription and Invoice Templates Wizard]()

18.3.3 Assign a Subscription Template to a Member

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

A Subscription Template may be assigned to a single member or a number of members at the same time.

> **To assign a single member to a Subscription**

1. Do one of the following:

   - In the Players list, select a Member and press **Enter Key**, or

   - In the Players list, select a Member, then on the **Players** menu, click **Edit Member**, or

   - On the **Players** menu, click **Edit Member** and select a Member from the list displayed.

1. Click the **Subscriptions** Tab.

2. In the **Subscription Template** list click one of the templates to associate it with the member.

> **To Assign a Template to a number of Members**

1. On the **Accounting** menu click **Subscriptions** and then click **Assign Template to Members**.

2. Select a Subscription Template in the list and click **OK**.

3. You will be prompted "*Assign Template to All members with the same Membership Category?*"

   - Selecting **No** will display a list of members and their current Subscription Template, if any. Tick the box along side each member you wish to assign to the (previously selected) Subscription Template.

   - Selecting **Yes** will display a list of membership categories. Tick the box along side each membership category to choose the members in those membership categories that you wish to assign to the (previously selected) Subscription Template.

4. Click **OK** when you have finished selecting the members or membership categories and all the members will be will be assigned the selected Subscription Template.

1. On the **Reports** menu, click **Accounting Reports**, then **Members Without A Subscription Template**.

- To remove a Subscription Template from a member select the *None* template.

- When assigning multiple members to a Subscription Template, if you select members who are assigned a different template, you will be prompted to confirm that if you wish to continue to assign members to the new subscription template. If you select No then **none** of the members will be assigned to the new subscription template.

- When assigning membership categories to a Subscription Template, if you select membership categories which contain members who are assigned a different template, you will be prompted to confirm that you wish to continue to assign members to the new subscription template. If you select No then none of the members in the membership categories will be assigned to the new subscription template.

18.3.4 Edit a Subscription Template

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

You may wish to edit a Subscription Template perhaps to add or delete a Payment Item.

1. Do one of the following:

   - On the **Accounting** menu click **Subscriptions,** then **Edit Template.** A list of Subscription Templates is displayed, click one of the Templates to highlight it and then click **OK**

   - On the Task/Explorer tab, click **Explorer** and then , then select the **Accounting** item and select **Subscription Templates.** On the list displayed right click with the mouse and select **Edit a Template**.

2. Enter the Template information using the Subscription and Invoice Template window.

- Editing a Subscription Template will not affect any subscriptions already raised, but will affect future subscriptions.

18.3.5 Copy a Subscription Template

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

You may wish to copy a Subscription Template perhaps to save time setting up a number of similar templates.

To copy a Subscription Template

1. Do one of the following:

   - On the **Accounting** menu click **Subscriptions** and then click **Copy Template.** A list of Subscription Templates is displayed, click one of the templates to highlight it and then click **OK**

   - On the Task/Explorer tab, click **Explorer** and then , then select the **Accounting** item and select **Subscription Templates.** Highlight the template you wish to copy. Then right click with the mouse and select **Copy Template**.

2. You will be offered the choice to change the copied template to an **Invoice** template.

3. Confirmation of the new type and name of template will be displayed.

Notes:

Copying a Subscription Template will not affect any subscriptions already raised.

18.3.6 Delete a Subscription Template

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

To delete a Subscription Template

1. Do one of the following:

   - On the **Accounting** menu click **Subscriptions** and then click **Delete Template.** A list of Subscription Templates is displayed, click one of the templates to highlight it and then click **OK**

   - On the Task/Explorer tab, click **Explorer** and then , then select the **Accounting** item and select **Subscription Templates.** Highlight the template you wish to delete. Then right click with the mouse and select **Delete Template** or press the **DELETE** key

2. Confirm the deletion

Notes:

- If a template is assigned to one or more members you will not be able to delete it and a message will be displayed. In this case you must assign another template to those members.

- You can get a list of the members assigned to a template, which can include Visitors (previously a member now converted to a visitor) or Past members to identify who needs to be assigned a template of "None". On the **Reports** menu select **Accounting Reports** and select **Subscriptions (Summary)** report. The 2nd section of this report includes details of members/visitors assigned to a template.

- For Past members you can edit the member details and assign the "None" subscription template. If you have a Visitors you must temporarily make the visitor a member, assign the "None" subscription template then revert the member to a visitor.

18.3.7 Raise a Subscription

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

To Raise a Subscription

1. On the **Accounting** menu, click **Subscriptions** then click **Raise Subscriptions**.

2. Raise the Subscription using The Raise Subscription Wizard

18.3.8 The Raise Subscription Wizard

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

The Raise Subscription Wizard guides you through the process of raising membership subscription renewals.

The Raise Subscription Wizard

This briefly describes how the Raise Subscription Wizard operates

1. Click **Next >** to review or raise subscriptions

   You will now be offered the choice of **Review Subscription Details** or **Raise Subscriptions**.

   It is recommended that your review the subscriptions before raising the subscriptions.

   Note: You may click **Remember as future default** if you wish the **Raise Subscriptions** action to be the default every time you run this wizard. If you have already selected this as the default you may click **Cancel as future default** to cancel this.

   A count of the number of members who have not yet been assigned a subscription template will be displayed with the option to list those members.

   Note: If you do review subscriptions or list members without a template then you will need to restart the wizard and select **Raise Subscriptions** to proceed with raising the subscriptions.

2. Select **Raise Subscriptions** and click **Next >** to select the method of raising renewals

Select method of Raising Renewals

3. If you wish to **Raise subscriptions using template date** then select one of the following methods

- **One or more members**
  This will allow you to select one or more specific members for whom subscription renewals are to be produced.

- **One or more subscription templates**
  This will allow you to select one or more Subscription Templates, and thus the associated members for whom subscription renewals are to be produced.

- **Members assigned to membership categories**
  This will allow you to select one or more membership Categories, and thus the associated members for whom subscription renewals are to be produced.

- **Members assigned to member subscription pools**
  This will allow you to select one or more Member subscription Pools, and thus the associated members for whom subscription renewals are to be produced. Choose this option if you wish to send subscriptions by e-mail to Member Subscription Pool Contacts.

- **All members**
  This will allow you to select members who have been assigned a Subscription Template, and for whom subscription renewals are to be produced.

Note members who have a template based on Anniversary of Joining are excluded in the above selections.

4. if you wish to **Raise subscriptions based on Anniversary of Joining** then select

- **Members based on their anniversary of joining**
  This will allow you to select members who have a 'Date Joined' anniversary within a selected time period from Today, and for whom subscription renewals are to be produced.

  - Select the **Last X Days** and the **Next Y Days** from today's date to define the time period to be used for including those members with a date joined anniversary date in this time period.

Note: Members who do not have a [Date Joined](#) membership value are excluded.

5. Click **Next >**

Select Members, Templates, Categories or Member Subscription Pools

6. Do one of the following:

- If selecting Members, tick the box next to one or more member's name to raise a subscription renewal for this member.

- If selecting Subscription Templates, tick the box next to one or more Subscription Templates for which you wish to raise subscription renewals.

- If selecting Membership Categories, tick the box next to one or more Membership Categories for which you wish to raise subscription renewals.

- If selecting Members assigned to Member Subscription Pools, tick the box next to one or more Member Subscription Pools for which you wish to raise subscription renewals.
- If selecting Members on the basis of their anniversary of date joined a list of the members who are included the time period selected is displayed and the box alongside each one is ticked. Un-tick any member's who are to be excluded from having a subscription raised.

7. Click **Next >**

Letters

8. Tick the **Issue Subscriptions as Letter** box if you wish the Wizard to generate Renewal letters rather than using the standard invoice layout. A list of existing letters is displayed.

Do one of the following:

- Select an existing Letter, or

- Select an existing Letter and click **Edit Letter** to edit this letter, or

- Click **New Letter** to create a new letter. You now use the standard Letter Writer to create the letter.

    Note: Within the Letter Writer additional text fields have been added to allow for subscription related letters to be generated. See Subscription Related Fields in Letters for further details.

9. Click **Next >**

Options

10. If you wish to include a member's positive account balance to be used as a contribution to their subscription tick this box. This will then use the member's account balance to reduce the amount that they have to pay.

11. If you will be sending subscriptions by E-mail you may configure the subject of the e-mail, and the text that will be placed in the e-mail. The subscription details will automatically be attached to the e-mail. If you do not intend to e-mail Subscriptions leave these at the default values.

Completing the Raise Subscription Wizard

12. Click **Finish** to generate the Subscription renewals

E-mailing Subscriptions

When the Wizard has finished you may click the E-mail button in the reports toolbar to send subscriptions by e-mail to those members who have opted to receive subscriptions by e-mail.

You will be prompted to add an attachment file in addition to the subscription. Click **Yes** and then browse and select the file you wish to attach. This may be a document of any format.

At the end of the sending of the e-mails if there are any members who either do not have an e-mail address or who have not opted to receive subscriptions by e-mail click **Yes** at the prompt that will be displayed and select the required printer to print the subscriptions.

A summary of the e-mails sent will then be displayed.

Notes:

- If a member is not assigned a Subscription Template then they will NOT have a subscription raised.

- Depending on the number of subscriptions being generated it may take a short time for the wizard to complete raising the subscriptions.

- Only members who have a valid e-mail address and have been selected to receive subscriptions by e-mail will receive subscriptions by e-mail and have not opted out under GDPR to receive e-mails..

- When raising subscriptions for **Member's anniversary of date joined** Members who do not have a Date Joined membership value are excluded.

- When raising subscriptions for **Members assigned to member subscription pools** and where the Pool Contact is a member then e-mails will only be sent if the member has been selected to receive subscriptions by e-mail. If the Pool Contact is not a member then the e-mail address must be valid to receive the subscriptions by e-mail.

- When you finish the wizard you may see the message:

   "There are outstanding Subscription Invoices raised within the last 45 days for some members.

   Do you wish to VOID these and for new invoices to be raised for those members?

   Selecting No will raise subscriptions for members (if any) who do not have subscriptions raised within the last 45 days."

   This indicates the wizard has identified that some of the selected members have recently had subscriptions raised, but there have been no payments recorded. If you select 'Yes' then these subscription invoices will be voided. Typically this message will appear if you re-run the subscription wizard after noticing some changes are required.

   If you select No then subscriptions will only be raised for those members who have not recently had subscriptions raised.

   This may be useful if you have for example raised some subscriptions by Member Subscription Pool and then raise subscriptions by Subscription template where some of the Member Subscription Pool members are assigned the subscription template.

- When you finish the wizard you may see the message:

   "Some of the selected Members have valid Subscriptions that expire in more than 45 days. Raise Subscriptions for those Members as well as those with expired or about expire memberships?".

   This indicates the wizard has identified that some of the members selected have got valid paid subscriptions. Perhaps you have some members that paid previously and their subscriptions are not due to expire for some time. Selecting **NO** will stop the wizard raising new subscriptions for those members.

- When raising subscriptions for **Members assigned to Member Subscription Pools** and you send the subscriptions by e-mail, and there is more than one subscription for the Member Subscription Pool then additional text is added to the end of the text of the e-mail indicating the number of subscriptions in the attachment.

18.3.9 View a Member's Subscription

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

To view a Member's subscription details

1. Do one of the following:

   - On the **Accounting** menu click **Subscriptions** and then click **View .** A list of Subscriptions is displayed, click one of the Subscriptions to highlight it and click **OK** to display the details.

   - On the Task/Explorer tab, click **Explorer** and then , then select the **Accounting** item and select **Subscriptions.** Highlight the Subscription you wish to view. Then right click with the mouse and select **View**.

Notes:

- You may also get a list of Subscriptions from the **Accounting** Places by clicking **All Subscriptions** or **Subscriptions in Current Year**. Then if you click on the appropriate subscription in the list to highlight it you may then right click with the mouse and select the **View** option.

18.3.10 Amend Subscription Notes

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

To amend Subscription Notes

1. Do one of the following:

   - On the **Accounting** menu click **Subscriptions** and then click **Amend Note .** A list of Subscriptions is displayed, click one of the Subscriptions to highlight it and click **OK** to display the notes which may be amended.

   - On the Task/Explorer tab, click **Explorer** and then , then select the **Accounting** item and select **Subscriptions.** Highlight the subscription with the note you wish to amend. Then right click with the mouse and select **Amend Note**.

2. Edit the note as required.

Notes:

- You may also get a list of Subscriptions from the **Accounting** Places by clicking **All Subscriptions** or **Subscriptions in Current Year**. Then if you click on the appropriate subscription in the list to highlight it you may then right click with the mouse and select the **Amend Note** option.

- In the list of subscriptions displayed when selecting **Accounting** menu -> **Subscriptions** you may scroll to the right of the list to see the current notes

18.3.11 Find Overdue Subscriptions

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

To obtain a list of members with overdue subscriptions:

1. On the **Reports** Menu click the **Accounting Reports** option and then **Overdue Subscriptions**.

2. On the Report Selection screen, select who to include in the report and then click **OK** to view the Overdue Subscriptions report.

18.3.12 Reprint Subscription Invoices

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

Reprint a single subscription

If a member requires a copy of a subscription invoice previously sent you can print a copy as follows.

1. On the **Accounting** Menu click **Subscriptions** then click **Print**.

2. Click one of the Subscriptions to highlight it and click **OK** to print the Subscription on the default printer.

Notes:

- You may also get a list of Subscriptions from the **Accounting** Places by clicking **All Subscriptions** or **Subscriptions in Current Year**. Then if you click on the appropriate subscription in the list to highlight it you may then right click with the mouse and select the **Print** option and a copy of the subscription will be printed to your default printer.

- The status of the payments at the time of the print will be displayed. For example: a member is paying monthly and has paid a couple of payments these will show as paid and the remaining will be displayed as outstanding (or overdue if appropriate).

Reprint a range of subscriptions

To reprint a range of subscriptions do the following:

1. On the **Accounting** menu, click **Subscriptions** then click **Reprint Subscriptions**.

2. Select the subscription at the *start* of the range to be reprinted in the list. You may change the list sort order by clicking on a column header.

3. Click **Next >.**

4. Select the subscription at the *end* of the range to be reprinted in the list. You may change the list sort order by clicking on a column header.

5. Click **Finish**.

Notes:

- The report of subscriptions may be reprinted or e-mailed in the normal manner.

- When e-mailing there is an option to "Limit reprint to members who do NOT receive subscriptions by e-mail", allowing the reprinting of those member's subscriptions when there was for example: a printer fault at the time of the initial subscription run.

18.3.13 Address Labels for Subscriptions

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

Address labels may be produced for subscriptions that have previously been raised.

These labels may be printed to sheets of labels and then placed on envelopes removing the need for windowed envelopes.

To produce address labels from existing subscriptions

1. On the Accounting drop-down menu, click **Subscriptions** then click **Address Labels**.

2. Select the subscription at the *start* of the range to be selected for address labels. You may change the list sort order by clicking on a column header.

3. Click **Next >**.

4. Select the subscription at the *end* of the range to be selected for address labels. You may change the list sort order by clicking on a column header.

5. Click **Finish**.

6. Choose the type of Label you will be using in the **Label Type** box.

7. In the **Start at Label** boxes, select a Row and Column where the labels are to be printed from. This can be useful if a partially used page of labels is to be re-used, as it allows position of used labels to be skipped. Not applicable where labels on rolls are being used.

8. Click **OK**.

Notes:

- The start subscription number must be equal or less than the end subscription number.

- If a member does not have a postal address then no label will be printed

- Where one or more subscriptions are for a Member Subscription Pool, a single label will be created for the Member Subscription Pool contact, if a valid address is available.

- Where smaller sized labels are used such as the PLL-36, you may need to adjust your printer settings to use options such as 'borderless printing' to ensure good placement of the text within the labels.

18.3.14 Resend a Subscription Invoice by E-mail

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

If a member requires an e-mail copy of a subscription invoice previously sent you can e-mail a copy as follows.

1. On the **Accounting** Menu click **Subscriptions** then click **E-mail**.

2. Click one of the Subscriptions to highlight it and click **OK**.

3. Now confirm the E-mail recipient details and enter a suitable message. Click **Send** and the e-mail will be sent with the subscription invoice added as Portable Document File attachment.

Notes:

- You may also get a list of Subscriptions from the **Accounting** Places by clicking **All Subscriptions** or **Subscriptions in Current Year**. Then if you click on the appropriate subscription in the list to highlight it you may then right click with the mouse and select the **E-mail** option and then you may confirm the E-mail recipient details and enter a suitable message. Click **Send** and the e-mail will be sent with the subscription invoice added as Portable Document File attachment.

- The status of the payments at the time of the e-mail will be updated. For example: a member is paying monthly and has paid a couple of payments these will show as paid and the remaining will be displayed in the attachment as outstanding (or overdue if appropriate).

18.3.15 Raise an Overdue Subscription

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

To Raise an Overdue Subscription Invoice or Letter

1. On the **Accounting** menu, click **Subscriptions** then click **Overdue Subscriptions**.

2. Raise the Overdue Subscription using The Overdue Subscriptions Wizard

18.3.16 The Overdue Subscriptions Wizard

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

The Overdue Subscription Wizard guides you through the process of creating letters or invoices for overdue membership subscription renewals.

The Overdue Subscription Wizard

This briefly describes how the Overdue Subscription Wizard operates

1. Click **Next >** to select the method of managing overdue renewals

Select method of managing Overdue Renewals

2. Select one of the following methods for Manage Overdue Subscriptions

- **One or more Members**
  This will allow you to select one or more specific members for whom overdue subscriptions letters are to be produced.

- **One or more Subscription Templates**
  This will allow you to select one or more Subscription Templates, and thus the associated members for whom overdue subscription letters are to be produced.

- **Members assigned to Membership Categories**
  This will allow you to select one or more membership Categories, and thus the associated members for whom overdue subscription letters are to be produced

- **Members assigned to Member Subscription Pools**
  This will allow you to select one or more Member Subscription Pools, and thus the associated members for whom overdue subscription letters are to be produced.

- **All Members**
  This will allow you to select members who have been assigned a Subscription Template, and for whom overdue subscription letters are to be produced.

3. Click **Next >**

Select Members, Templates,Categories or Member Subscription Pools

4. Do one of the following:

- If selecting Members, tick the box next to one or more member's name to produce an overdue subscription letter for this member.

- If selecting Subscription Templates, tick the box next to one or more Subscription Templates for which you wish to produce overdue subscription letters.

- If selecting Members assigned to Member Subscription Pools, tick the box next to one or more Member Subscription Pools for which you wish to produce overdue subscription letters.

5. Click **Next >**

Letters

6. Tick the **Issue Letters with Overdue Subscription** box if you wish to the Wizard to generate overdue letters in addition to invoices. A list of existing letters is displayed.

Do one of the following:

- Select an existing Letter, or

- Select an existing Letter and click **Edit Letter** to edit this letter, or

- Click **New Letter** to create a new letter. You now use the standard Letter Writer to create the letter.

  Note: Within the Letter Writer additional text fields have been added to allow for subscription related letters to be generated. See Subscription Related Fields in Letters for further details.

7. Click **Next >**

Options

8.   If sending overdue subscriptions by E-mail you may configure the subject of the e-mail, and the text that will be placed in the e-mail. The overdue subscription details will automatically be attached to the e-mail. If you do not intend to e-mail overdue subscriptions leave these at the default values.

Completing the Overdue Subscription Wizard

9. Click **Finish** to generate the overdue Subscription letters

E-mailing Overdue Subscriptions

When the Wizard has finished you may click the E-mail button   in the reports toolbar to send overdue subscriptions by e-mail to those members who have opted to receive subscriptions by e-mail.

You will be prompted to add an attachment file in addition to the overdue subscription. Click **Yes** and then browse and select the file you wish to attach. This may be a document of any format.

At the end of the sending of the e-mails if there are any members who either do not have an e-mail address or who have not opted to receive subscriptions by e-mail click **Yes** at the prompt that will be displayed and select the required printer to print the subscriptions.

A summary of the e-mails sent will then be displayed.

At the end of the sending of the e-mails there is an option to print the overdue subscriptions for those members who either do not have an e-mail address or who have not opted to receive subscriptions by e-mail.

A summary of the e-mails sent will then be displayed.

Notes:

- If a member is up to date with their subscription then no overdue letter is produced for that member.

- Depending on the number of overdue subscriptions being generated it may take a short time for the wizard to produce the overdue subscription letters.

- Only members who have a valid e-mail address and have been selected to receive subscriptions by e-mail will receive the overdue subscriptions by e-mail.

- Only members who have a valid e-mail address and have been selected to receive overdue subscriptions by e-mail will receive subscriptions by e-mail.

- For Members assigned to Member Subscription Pools where the Pool Contact is a member then e-mails will only be sent if that member has been selected to receive subscriptions by e-mail. If the Pool Contact is not a member then the contact e-mail address must be valid to receive the overdue subscriptions by e-mail.

18.3.17 Void Multiple Subscriptions

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

In some cases it may be necessary to void a range of subscriptions.

To void multiple subscriptions by range

1. Do one of the following:

- Click **Accounting** menu, then **Subscriptions**, then **Void Multiple Subscriptions by range**.

- On the Left Hand Task Pane, select **Accounting** place, then in the **All Subscriptions** or **Subscriptions in Current Year** list, right-click and select **Void Multiple Subscriptions by range.**

2. Select the subscription at the *start* of the range to be selected for voiding. You may change the list sort order by clicking on a column header.

3. Click **Next >**.

4. Select the subscription at the *end* of the range to be selected for voiding. You may change the list sort order by clicking on a column header.

5. Click **Finish**.

Notes:

There may be gaps in the list of subscriptions displayed, as some subscriptions may be in a status that means they are not suitable to be voided, e.g. they are already voided.

In some cases it may be necessary to void a range of subscriptions.

To void multiple subscriptions from list

1. Do one of the following:

- Click **Accounting** menu, then **Subscriptions**, then **Void Multiple Subscriptions from list**.

- On the Left Hand Task Pane, select **Accounting** place, then in the **All Subscriptions** or **Subscriptions in Current Year** list, right-click and select **Void Multiple Subscriptions from list.**

2. Tick the boxes along side the subscriptions you wish to void, or click **Select All**. You may change the list sort order by clicking on a column header.

3. Click **OK**

4. Confirm that you wish to void the subscriptions by clicking OK

Note

It may take some time to void if you select a large number of subscriptions.

18.3.18 Managing Annual Subscription Run

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

Before an annual subscription run you may need to consider the following:

1.   Payment Item adjustments

You may need to adjust the values of a number of payment items.

On the Task/Explorer tab, click **Explorer** and then , then select the **Accounting** item and select **Payment Items.** On the list displayed double click with the mouse to **Edit a Payment Item**.

You may now adjust the value and then click OK.

Repeat this for any other payment items that need to be adjusted.

The new values will be automatically included in any subscriptions raised after these edits.

2.   Review the templates that are assigned to members and change if required.

Typically most members will retain the template from the previous year, but in some cases a change may be required where a member is changing membership category. E.g. A junior becoming an adult etc.

On the **Reports** menu, click **Accounting Reports**

Select **Subscriptions (Summary)** or **Subscriptions (Full Details)**

To change an individual's subscription template click **EDIT MEMBER** in the toolbar and then select the **Subscriptions** tab and select a new template within the **Subscription Template** box.

3.   Raise the subscriptions

On the **Accounting** menu, click **Subscriptions** then click **Raise Subscriptions**.

Raise the Subscription using The Raise Subscription Wizard

18.3.19 Direct Debit

18.3.19.1 Overview

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

This section describes the extracting of data for Direct Debit instructions for members subscriptions to be sent to your club's bank for processing. There is a facility to generate 'New Instructions' and a regular 'Month Instructions' extract file.

To use this facility there are some initial configuration steps required.

Then member's Direct Debit account details need to be entered

Then subscription invoices may be raised and direct debit instructions may then be extracted for sending to your bank.

New Instructions should be raised for members who initiate a new direct debit before any monthly direct debit instructions are raised.

When payments are confirmed these should be recorded, with defaulters being recorded to allow for an increased payment request the following month.

It is also possible to record payments by defaulters that are paid by means other than Direct Debit, these can be a full month's payment or a partial payment.

NOTE:

Before using this facility please check with HandicapMaster Ltd that your bank's Direct Debit data format is supported.

18.3.19.2 Initial Configuration

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

To be able to extract Direct Debit instructions some configuration and entering of Direct Debit account details is required.

The following sections MUST be completed for the Direct Debit Extract facility to operate correctly.

'Direct Debit' Method of Payment

Your HandicapMaster system MUST have a "Direct Debit" method of payment configured. This is used to identify those members paying by Direct Debit. Without this 'Method of Payment' the Direct Debit Extract will not operate.

To confirm if you have this method of payment or to add it do the following:

• On the **Accounting** menu click **Configure,** then **Methods of Payment.**

• A list of Methods of Payment are displayed

• If "Direct Debit" is not listed, then click **Add** to add a new entry with the name Direct Debit".

Configure Folder for Extract Files and Extract Format

Before a direct debit extract can be made you MUST select a folder where the extract files will be created as follows:

• On the **Accounting** menu select **Configure,** then **Direct Debit**

• Click **Select Folder**

    Choose a folder where all direct debit instruction extract files will be written to and that your account have full access within Windows to the folder selected.

Now select the appropriate Bacs extract file format from the list.

Note: Before using this facility please check with HandicapMaster Ltd that your bank's Direct Debit data format is supported.

Set zero Grace period

To assist with processing, we recommend that when raising direct debit subscriptions, you have no grace period for late payment.

On the **Accounting** menu select **Options** and then set the value of **Days before an invoice or subscription is overdue** to 0

If the grace period is set to 0 then the payment dates are regular e.g. 10th of each month rather than with X days grace.

Notes:

The Files that will be extracted either for 'New Instructions' or for 'Monthly Extract" will be named as follows:

The extract file will be created in the chosen folder with the name "BACS-New-Instructions-YYYYMMDD-NN.csv" for 'New Instructions' or "BACS-Instructions-YYYYMMDD-NN.csv" for 'Monthly instructions.

Where YYYYMMDD is the date in the format of Year, Month and Day when the file was extracted and NN is an incrementing counter, starting at 01 each day).

18.3.19.3 Enter Members Direct Debit Account Details

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

To be able to extract BACS Direct Debit Instructions you must record a member's back account details as follows:

1.   Do one of the following:

   - In the Players list, select a Member and press **Enter** Key, or

   - In the Players list, select a Member, then on the **Players** menu, click **Edit Member**, or

   - On the **Players** menu, click **Edit Member** and select a Member from the list displayed.

2. Select the **Subscriptions** tab.

3. Click the **Default Method of Payment** box. Select **Direct Debit**. The **Bank Details** section will be displayed.

Enter the following

   - Account Name   (a string up to 20 characters)

   - Account Number   (an 8 digit number)

   - Sort Code   (AA-BB-CC where A,B and C are numbers)

   - Reference   (a string of up to 18 characters)

4. The option **Direct Debit Instruction Set-up Completed** should **ONLY** be ticked when the 'New Instruction' for this member has been **confirmed** by your bank.

18.3.19.4 New Instructions Extract

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

Before a direct debit payment can be made a "New Instruction" request is required to be issued to your bank.

Once you have entered one or more members Direct Debit Account Name, Account Number, Sort Code and Reference details you may then create a "New Instruction Extract"

- On the **Accounting** menu select **Direct Debit,** then select **Extract**

- Select **New Instructions**

- In **Extract payments due on or before:** select the date that you wish to extract payments up to an including

    For example if you have configured your direct Debit payments in the Subscription template for the 10th of the Month you would need to select a date of the 10th of the month in question, or later.

- Click **Extract**

The New Instruction extract file will be placed in the folder that you configured above. You may then submit this file to your Bank in the usual manner.

Notes

The number of Monthly instructions written to the file will be displayed and if there are any members with missing direct debit details, which will prevent that member having an initial instruction entry in the file, that count will also be displayed, and the members with insufficient direct debit details will be logged in a separate file.

18.3.19.5 Confirm a 'New Instruction' as set-up

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

Once you have had confirmation from your bank that the 'New Instruction' has been completed please edit the members in question and tick the option to record this to include the member within Monthly Instructions Direct Debit extracts as follows:

- On the **Accounting** menu select **Direct Debit,** then select **Extract**

- Select **Monthly Instructions**

- Click **Extract**

The New Instruction extract file will be placed in the folder that you configured above. You may then submit this file to your Bank in the usual manner.

Notes

NOTE: Until this is done this member will be excluded from the Monthly Instructions Direct Debit Extract.

18.3.19.6 Monthly Instructions Extract

> Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

Once a month you will normally create a 'Monthly Instructions' extract file to request that month's direct debits.

1.   Do one of the following:

- In the Players list, select a Member and press **Enter** Key, or
- In the Players list, select a Member, then on the **Players** menu, click **Edit Member**, or
- On the **Players** menu, click **Edit Member** and select a Member from the list displayed.

2. Select the **Subscriptions** tab.

Scroll down the tab to the option **Direct Debit Instruction Set-up Completed**. Tick this to confirm that the "new Instruction" has been completed and confirmed by your bank.

<div style="background:#ffffcc;border:1px solid #999;padding:4px">Notes</div>

NOTE: Until a member has had a 'New Instruction' confirmed they will be excluded from the 'Monthly' Direct Debit Extract.

18.3.19.7 Manage Direct Debit payments and Defaulters

To record Direct Debit payments that have been received there is a wizard to assist you.

- On the **Accounting** menu select **Direct Debit,** then select **Manage Payments Received**
- Click **NEXT**

  A list of Direct Debit payments that are outstanding or overdue will be generated and then displayed. (this can take a short time)

  Tip: You may maximise the window to see a larger list.

  All payments will be marked to be recorded as **paid**.

  If there are any defaulters (non-payers) locate them in the list and un-tick their payment(s)

- Once you have reviewed the list click **NEXT**
- Click **FINISH** to record the payments.

18.3.19.8 Other Information

In addition to the details in this help information there is a more detailed help document with some common questions about Direct Debit. This is available from the HandicapMaster website

Additional Subscriptions Option Documention

18.4   Invoices

18.4.1   Introduction

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

To manage invoices for members, HandicapMaster makes use of the concept of an "Invoice Template".

Each "Invoice Template" consists of a list of Payment Items.

A Payment Item describes a billable item and its cost or charge.

This flexible approach allows you to define different templates for different invoices. An Invoice Template can be assigned to one or more members.

Contents

- Create an Invoice Template

- Edit an Invoice Template

- Copy an Invoice Template

- Delete an Invoice Template

- Raise an Invoice

- View an Invoice

- Amend Invoice Notes

- Find Overdue Invoices

- Reprint an Invoice

- Resend an Invoice by E-mail

18.4.2   Create an Invoice Template

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

To create an Invoice Template

1. Do one of the following:

   - On the **Accounting** menu click **Invoices,** then **Set up a Template.**

   - On the Task/Explorer tab, click **Explorer** and then , then select the **Accounting** item and select **Invoice Templates.** On the list displayed right click with the mouse and select **Set up a Template**.

2. Create a Template using the Subscription and Invoice Templates Wizard

18.4.3 Edit an Invoice Template

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

You may wish to edit an Invoice Template perhaps to add or delete a Payment Item.

To edit an Invoice Template

1. Do one of the following:

   - On the **Accounting** menu click **Invoices,** then **Edit Template.** A list of Invoice Templates is displayed, click one of the Templates to highlight it and then click **OK**

   - On the Task/Explorer tab, click **Explorer** and then , then select the **Accounting** item and select **Invoice Templates.** On the list displayed right click with the mouse and select **Edit a Template**.

2. Enter the Template information using the Subscription and Invoice Template window.

Notes:

- Editing an Invoice Template will not affect any invoices already raised, but will affect future invoices.

18.4.4 Copy an Invoice Template

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

You may wish to copy an Invoice Template perhaps to save time setting up a number of similar templates.

To copy an Invoice Template

1. Do one of the following:

   - On the **Accounting** menu click **Invoices** and then click **Copy Template.** A list of Invoice Templates is displayed, click one of the templates to highlight it and then click **OK**

   - On the Task/Explorer tab, click **Explorer** and then , then select the **Accounting** item and select **Invoice Templates.** Highlight the template you wish to copy. Then right click with the mouse and select **Copy Template**.

2. You will be offered the choice to change the copied template to a SUBSCRIPTION template.

3. Confirmation of the new type and name of template will be displayed.

Notes:

Copying an Invoice Template will not affect any Invoices already raised.

18.4.5 Delete an Invoice Template

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

To delete an Invoice Template

1. Do one of the following:

   - On the **Accounting** menu click **Invoices** and then click **Delete Template.** A list of Invoice Templates is displayed, click one of the templates to highlight it and then click **OK**

   - On the Task/Explorer tab, click **Explorer** and then , then select the **Accounting** item and select **Invoices Templates.** Highlight the template you wish to delete. Then right click with the mouse and select **Delete Template** or press the **DELETE** key

2. Confirm the deletion

18.4.6 Raise an Invoice

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

To raise an Invoice

1. On the **Accounting** menu, click **Invoices** then click **Raise Invoices**.

2. Raise the Invoices using The Raise Invoice Wizard

18.4.7 The Raise Invoices Wizard

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

The Raise Invoice Wizard guides you through the process of raising invoices.

The Raise Invoices Wizard

This briefly describes how the Raise Invoices Wizard operates

1. Click **Next >** to select the method of raising invoices

Select method of Raising Invoices

3. Select one of the following methods for **Create an Invoice for**

- **One or more Members**
  This will allow you to select one or more specific members for whom subscription renewals are to be produced.

- **Members assigned to Membership Categories**
  This will allow you to select one or more membership Categories, and thus the associated members for whom subscription renewals are to be produced.

- **Members assigned to Member Subscription Pools**
  This will allow you to select one or more Member Subscription Pools, and thus the associated members for whom subscription renewals are to be produced. Choose this option if you wish to send subscriptions by e-mail to Member Subscription Pool Contacts.

- **All Members**
  This will allow you to select members who have been assigned a Subscription Template, and for whom subscription renewals are to be produced.

4.   Click **Next >**

Select Members, Categories or Member Subscription Poolss

5.   Do one of the following:

- If selecting Members, tick the box next to one or more member's name to raise an invoice for this member.

- If selecting Membership Categories, tick the box next to one or more Membership Categories for which you wish to raise invoices.

- If selecting Members assigned to Member Subscription Pools, tick the box next to one or more Member Subscription Pools for which you wish to raise invoices.

6.   Click **Next >**

Invoice Details

7.   In the **Name and Description** box enter a suitable name and descriptions.

8.   From the **Template** select the template you wish to use as the basis for the Invoice. Click **New** if you wish to create a new invoice template. The **1st Payment Due D**ate will then be updated to reflect the settings in the selected template.

9.   Change the **1st Payment Due Date** if required.

10.   The **Notes** box may be used to record any details you wish to record.

11.   If required, click **Add** button to add Payment Items to the invoice. Select the appropriate items from the list. If the list does not contain a suitable item then click **New** button if you need to create a new Payment Item.

12.   To delete a Payment Item click on it to highlight it and click the **Delete** button to remove it from the Invoice.

13.   Click **Next >**

Options

14.   Select the option for sending of the invoices from one of the following.

- Print Invoices

  ▪ No printing of Invoices

  ▪ E-mail Invoices with option to print for members not configured to receive e-mails

If you select "E-mail Invoices with option to print for members not configured to receive e-mails" the e-mail details are displayed.

You may then modify the E-mail options. These are the **Subject of e-mail** and **Text to include with e-mail**. The Invoice details will be added as an attachment to the e-mail.

In addition an extra attachment may be added by clicking the **Add Attachment** button. You may then browse to the file to be added.

To delete the attachment click the Add Attachment button again.

15. Click **Next >** to continue.

Printers

16. If you have selected an option where there may be printed invoices then you are asked to select the printer to which any invoices that are printed will be sent. Select the appropriate printer and then click **Next >** .

Completing the Raise Subscription Wizard

17. Click **Finish** to generate the Invoices.

Notes:

● Depending on the number of Invoices being generated it may take a short time for the wizard to complete raising the invoices.

● Only members who have a valid e-mail address and have been selected to receive subscriptions by e-mail will receive subscriptions by e-mail.

● When raising invoices for **Members assigned to Member Subscription Pools** and where the Pool Contact is a member then e-mails will only be sent if the member has been selected to receive subscriptions by e-mail. If the Pool Contact is not a member then the e-mail address must be valid to receive the subscriptions by e-mail.

18.4.8 View an Invoice

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

To view details of an Invoice

1. Do one of the following:

  ● On the **Accounting** menu click **Invoices** and then click **View .** A list of Invoices is displayed, click one of the Invoices to highlight it and click **OK** to display the details.

  ● On the Task/Explorer tab, click **Explorer** and then , then select the **Accounting** item and select

Invoices. Highlight the Invoice you wish to view. Then right click with the mouse and select **View**.

2. Click on **View Payments** to view the payment details.

Notes:

- You may also get a list of Invoices from the **Accounting** Places by clicking **All Invoices** or **Invoices in Current Year**. Then if you click on the appropriate Invoice in the list to highlight it you may then right click with the mouse and select the **View** option.

18.4.9 Amend Invoice Notes

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

To amend Invoice Notes

1. Do one of the following:

- On the **Accounting** menu click **Invoices** and then click **Amend Note .** A list of Invoices is displayed, click one of the Invoices to highlight it and click **OK** to display the notes which may be amended.

- On the Task/Explorer tab, click **Explorer** and then , then select the **Accounting** item and select **Invoices.** Highlight the Invoices with the note you wish to amend. Then right click with the mouse and select **Amend Note**.

2. Edit the note as required.

Notes:

- You may also get a list of Invoices from the **Accounting** Places by clicking **All Invoices** or **Invoices in Current Year**. Then if you click on the appropriate Invoice in the list to highlight it you may then right click with the mouse and select the **Amend Note** option.

- In the list of subscriptions displayed when selecting **Accounting** menu -> **Invoices** you may scroll to the right of the list to see the current notes

18.4.10 Find Overdue Invoices

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

To obtain a list of members with overdue Invoices:

1. On the **Reports** Menu click the **Accounting Reports** option and then **Overdue Invoices**.

2. On the Report Selection screen, select who to include in the report and then click **OK** to view the Overdue Invoices report.

18.4.11 Reprint an Invoice

> Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

If a member requires a copy of an invoice previously sent you can print a copy as follows.

1. On the **Accounting** Menu click **Invoices** then click **Print**.

2. Click one of the Invoices to highlight it and click **OK** to print the Invoice on the default printer.

Notes:

- You may also get a list of Invoices from the **Accounting** Places by clicking **All Invoices** or **Invoices in Current Year**. Then if you click on the appropriate Invoice in the list to highlight it you may then right click with the mouse and select the **Print** option and a copy of the Invoice will be printed to your default printer.

- The status of the payments at the time of the print will be displayed.
  For example: a member is paying monthly and has paid a couple of payments these will show as paid and the remaining will be displayed as outstanding (or overdue if appropriate).

18.4.12 Resend an Invoice by E-mail

> Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

If a member requires an e-mail copy of an invoice previously sent you can e-mail a copy as follows.

1. On the **Accounting** Menu click **Invoices** then click **E-mail**.

2. Click one of the Invoices to highlight it and click **OK**.

3. Now confirm the E-mail recipient details and enter a suitable message. Click **Send** and the e-mail will be sent with the invoice added as Portable Document File attachment.

Notes:

- You may also get a list of Invoices from the **Accounting** Places by clicking **All Invoices** or **Invoices in Current Year**. Then if you click on the appropriate Invoice in the list to highlight it you may then right click with the mouse and select the **E-mail** option and then you may confirm the E-mail recipient details and enter a suitable message. Click **Send** and the e-mail will be sent with the invoice added as Portable Document File attachment.

- The status of the payments at the time of the e-mail will be updated. For example: a member is paying monthly and has paid a couple of payments these will show as paid and the remaining will be displayed in the attachment as outstanding (or overdue if appropriate).

18.4.13 Void Multiple Invoices

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

In some cases it may be necessary to void a range of invoices.

To void multiple invoices by range

1. Do one of the following:

- Click **Accounting** menu, then **Subscriptions**, then **Void Multiple Invoices by range**.

- On the Left Hand Task Pane, select **Accounting** place, then in the **All Invoices** or **Invoices in Current Year** list, right-click and select **Void Multiple Invoices by range.**

2. Select the invoice at the *start* of the range to be selected for voiding. You may change the list sort order by clicking on a column header.

3. Click **Next >**.

4. Select the invoice at the *end* of the range to be selected for voiding. You may change the list sort order by clicking on a column header.

5. Click **Finish**.

Notes:

There may be gaps in the list of invoices displayed, as some invoices may be in a status that means they are not suitable to be voided, e.g. they are already voided.

To void multiple invoices from list

1. Do one of the following:

- Click **Accounting** menu, then **Subscriptions**, then **Void Multiple Invoices from list**.

- On the Left Hand Task Pane, select **Accounting** place, then in the **All Invoices** or **Invoices in Current Year** list, , right-click and select **Void Multiple Invoices by from list**

2. Tick the boxes along side the invoices you wish to void, or click **Select All**. You may change the list sort order by clicking on a column header.

3. Click **OK**

4. Confirm that you wish to void the invoices by clicking OK

Note

It may take some time to void if you select a large number of invoices.

18.5 Subscription and Invoice Templates Wizard

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

The Subscription and Invoice Template Wizard allows you to define a new Subscription or Invoice Template.

Template Details and Payment Items

In the **Template Name** box enter the name to be given to the Template.

In the **Template Description** box you may enter a description, this is optional.

Click **Add** button to add Payment Items to the template. Select the appropriate items from the list. If the list does not contain a suitable item then click **New** button if you need to create a new Payment Item.

Click on a Payment Item and click **Delete** button to remove a Payment Item from the template.

Click **Delete All** button to remove all Payment Items from the template.

Payment Schedule

Select from the **Payment Schedule** list one of the payment schedules.

Payment Schedule	Description
Annual	1 payment per year
Monthly	12 payments, one each month
10 Months	10 payments over the year, each month for 10 months from start date
6 Months 6 month gap	6 payments one per month followed by 6 month gap
Quarterly	4 payments per year, 3 months apart
Two 6 Monthly	2 payments per year, 6 months apart
Three per year	3 payments per year, 4 months apart
4 Months 8 month gap	4 payments one per month followed by 8 month gap
Custom	Between 1 and 12 monthly payments may be selected as required.

Choose the **First Payment Due** date, this may either be

1. The **Subscription** or **Invoice Date** meaning the date the Subscription or Invoice is raised.

2. Click on **Other Date** to select a specific date. The default is today's date.

The **Subscription Expiry** date will be displayed for information.

Payment Details

Here you will see displayed the months and the payments due.

To change the schedule click **Back** and select a different **Payment Schedule**

If you have selected **Custom Payment Schedule** you will by default have 12 monthly payments selected.

You may then un-tick any months that you do not wish to have a payment. The payment values will be adjusted automatically to reflect the reduced number of months.

The default payment values are on the basis of being spilt equally with the first payment containing any remainder that cannot be split.

Click the **Adjust Payments** button to select a different way to split the values.

If VAT is in use then the Net and VAT amounts will be displayed.

The Total amount is displayed at the bottom.

Adjust Payments

You can choose how the payments are to be split from the following:

Split Values Equally

- First payment adjusted for any remainder that cannot be split (this is the default for a new template)
- Last payment adjusted for any remainder that cannot be split

Or

Round Values

- All payments to be whole number except First
- All payments to be whole number except Last

Or

Adjust First or Last Value

- First Payment adjusted
- Last Payment adjusted

This option allows a custom value for the first or last payment to be defined. For example to pre-load the first payment with a larger value to cover the cost of say the subscription and an annual fee (e.g. insurance). All other payments will be split equally, but the 2nd or 2nd from last payment may have an automatically adjusted value to take account of rounding etc. and be different from the other split equal payments.

Click **Next** and you will be returned to the Payment Details with the values adjusted based on the selection made.

Notes:

- If you select an 'other date' for the **First Payment Due**, this can be a date in the past.

- If you wish the Invoices or subscriptions to be overdue immediately from the date of issue, then set in the Accounting Options the **Days before an Invoice or Subscription is Overdue** to be 0, before raising invoices or subscriptions.

18.6 Payments

18.6.1 Introduction

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

The Payments area of Membership allows you to record payments for Subscriptions and Invoices.

In addition you may record payments for items that have not been invoiced. This type of ad hoc payment recording may be useful for recording items such as competition fees, bar levy etc.

All Payments recorded adjust a member's account balance by increasing the balance.

Notes:

You do need to select a suitable Payment Item to allow you to create the payment record.

Contents

- Record a Subscription or Invoice Payment

- View a Payment

- Reprint a Receipt

- Reprint a range of Receipts

- Resend a Receipt by E-mail

18.6.2 Record a single Subscription or Invoice Payment

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

To record a payment of a Subscription or Invoice

1. On the Task/Explorer tab, click **Explorer** and then , then select the **Accounting** item and select **All Subscriptions** or **All Invoices** lists, select a Subscription or Invoice and press **Enter**.

2. The Pay a Subscription or Pay an Invoice window will be displayed

The Pay a Subscription or Pay an Invoice Window

The Pay a Subscription or Pay an Invoice window allows you to record the payment of a Subscription or Invoice.

In the **Date of Payment** box select the date of the payment (this defaults to Today's date).

In the **Payment Method** box select the appropriate means of payment from the list.

Tick the **Print Receipt** box if you wish to have a receipt printed.

Tick the **E-mail Receipt** box if you wish to have a receipt e-mailed.

The **Notes** box can be use to record any details you wish, e.g. Cheque number.

If a monthly paid subscription or invoice is being paid, in the **Payments** list click on the specific payment that is to be recorded as paid.

The **Gross payment to be recorded** value will be automatically filled in when you select a payment.

Partial payment or Over payment

To record a partial payment you may adjust the **Gross payment to be recorded** value. It is possible to enter a value that is less than a specific payment or greater. If the amount is greater than the maximum outstanding for the whole invoice or subscription you can if required record an over payment.

The prompt: **Payment is larger than the amount due, record over payment as balance adjustment?**

is displayed.

Select **Yes** to record an over payment and automatically adjust the members purse balance to take account of the over payment.

If you select **No** the amount will be set to the maximum amount due.

Partial Payment

When a partial payment is recorded HandicapMaster will use the partial payment amount to pay as many payments as possible, starting with the oldest due payment.

If a payment value does not exactly match an outstanding payment then a new payment for the remaining outstanding amount will be created automatically and the original outstanding payment will be adjusted to match the payment.

Example:

If there are 12 payments monthly each of 10 units of currency.

If you were to record a payment of 25 units of currency then payments 1 and 2 would be marked as paid, payment 3 would be adjusted to 5 units of currency and be paid, and an additional payment for 5 units of currency would be added as payment 13, but with the same due date as payment 3.

Over Payment

If the payment to be recorded is greater than the maximum outstanding for the whole invoice or subscription then the invoice and subscription will be marked as paid and an additional payment will be recorded automatically and the members' purse balance will be adjusted (credited) to take account of the over payment. This over payment can be used when raising next years subscription to reduce the amount the member needs to pay.

Notes:

- The oldest payment that is due is selected by default and the gross amount to be paid is filled in automatically.

- The Print Receipt box will be ticked if you have ticked the **Automatically Print Receipt for Payment Transactions** box in the Accounting Options.

- The E-mail Receipt box will be ticked if you have ticked the **E-mail Receipts** box in the Accounting Options.

18.6.3 The Subscriptions, Invoices and Ad-hoc Payments Wizard

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

The Payments Wizard guides you through the process of recording Subscription, Invoice or Ad-hoc payments.

The Subscriptions or Invoice Payments Wizard

1. Do one of the following:

- Click the **Payment** icon in the toolbar or

- On the **Accounting** menu select **Payments Received.**

2. Click **Next >** to step over the introduction to the wizard.

Type of Payments to be recorded

3. Select the type of payments to be recorded from

- Subscription payments

- Invoice payments

- Ad-hoc payments

4. Click **Next >**

Record Payments for

5. Select who the payments are to be recorded for from:

One or More Members
This will allow you to select one or more specific members for whom payments are to be recorded.

One or More Membership Categories
This will allow you to select one or more Membership Categories, and thus the associated members for whom payments are to be recorded.

Members with a Default Method of Payment
This will allow you to select one or more default Methods of Payment, and thus the associated members for whom payments are to be recorded.

All Members
This will allow you to select all members who have a subscription or invoice, and for whom payments are to be recorded.

Click **Next >**

Select Members, Categories or Default Method of payment

6. Do one of the following:

- If selecting Members, tick the box next to one or more member's name to record a payment for this member.

- If selecting Membership Categories, tick the box next to one or more Membership Categories for which you wish to record payments.

- If selecting Members with Default method of Payment, tick the box next to one or more Methods

of Payment for which you wish to record payments.

7. Click **Next >**

If any of the selected members do not have default method of payment assigned to them this screen is displayed to allow the selection of the method of payment to be recorded for those members.

Click to highlight and select the required Method of Payment to be recorded for the payment for those members without a default Method of Payment.

8. Click **Next >**

Partial payment options (optionally displayed)

For Subscription or Invoice Payments it is possible to record a partial payment.

9. Tick the **Record partial payment** box to record a partial payment

10.Enter the value of the **Gross payment to be recorded**

11.**Select a payment option** for managing the partial payments

Skip members with due amount less than gross payment

or

Discard any remaining over payment

The Skip option will prevent any members who have a total due amount less than the value of the **Gross payment to be recorded** from being listed.

The Discard option will result in any subscriptions or invoices that are overpaid as being marked as paid and any over payment will NOT added to the member's balance.

At this point the page displayed depends on the type of payment initially selected.

Subscriptions - Confirm Payments

A list of members and their next due payment are displayed. Please note depending on the number of outstanding payments it may take a short time for the wizard to produce the list of payments.

*Note: If the partial payment option was chosen then the **total** amount due is displayed rather than the next due payment amount.*

In the **Date of Payment** box select the date of the payment (this defaults to Today's date).

Select the **Print Receipts** option if receipts are required to be printed

Select the **E-mail Receipts with option to print for members not configured to receive e-mails** option if the receipts are to be sent by e-mail

Select the **No Receipts** if you do not wish to create receipts, but just record the payments.

Review the list of payments that are to be recorded and remove the tick from those payments that are NOT to be recorded.

12. Click **Next >**

Invoices - Confirm Payments

A list of members and all outstanding invoices are displayed. Please note depending on the number of outstanding payments it may take a short time for the wizard to produce the list of payments.

*Note: If the partial payment option was chosen then the **total** amount due is displayed rather than the next due payment amount.*

In the **Date of Payment** box select the date of the payment (this defaults to Today's date).

Select the **Print Receipts** option if receipts are required to be printed

Select the **E-mail Receipts with option to print for members not configured to receive e-mails** option if the receipts are to be sent by e-mail

Select the **No Receipts** if you do not wish to create receipts, but just record the payments.

Review the list of payments that are to be recorded and remove the tick from those payments that are **NOT** to be recorded.

13. Click **Next >**

Ad-hoc Payment

The Ad-hoc payment page allow you to define what items are to be recorded as paid.

In the **Date of Payment** box select the date of the payment (this defaults to Today's date).

In the Payment Description you may enter a description of the payment e.g. Bar Levy

Select the **Print Receipts** option if receipts are required to be printed

Select the **E-mail Receipts with option to print for members not configured to receive e-mails** option if the receipts are to be sent by e-mail

Select the **No Receipts** if you do not wish to create receipts, but just record the payments.

You may optionally record notes with the payment.

14. Click **Next >**

Receipt Printer (optionally displayed)

If you have chosen previous to **Print Receipts** or **E-mail Receipts with option to print for members not configured to receive e-mails** then you will be asked to select the printer to which receipts should be printed.

Click on the required printer to highlight and select it.

15. Click **Next >**

Completing the Subscriptions, Invoice or Ad-Hoc Payments Wizard

16. Click **Finish** to record the payments and print or e-mail receipts if selected.

Notes:

- The **Print Receipts** option will be select if you have ticked the **Automatically Print Receipts for Payment Transactions** box in the Accounting Options.

- The **E-mail Receipts with option to print for members not configured to receive e-mails** option will be selected if you have ticked the **E-mail Receipts** box in the Accounting Options. This will override the **Automatically Print Receipts for Payment Transactions** box in the Accounting Options.

- If the **E-mail Receipts with option to print for members not configured to receive e-mails** option is selected and some of the recipients are not configured to receive invoices by e-mail, you will be offered the option to confirm that you wish to print those receipts.

- If a member has a number of outstanding subscription payments then only the most overdue

subscription payment is recorded.

- If you select the **One or More Members option** to select members and a member has no outstanding payments then they will not be listed.

- Depending on the number of outstanding payments it may take a short time for the wizard to produce the list of payments.

- If **Record partial payments** has been selected HandicapMaster will use the partial payment amount to pay as many payments as possible, starting with the oldest due payment.

  If a payment value does not exactly match an outstanding payment then a new payment for the remaining outstanding amount will be created automatically and the original outstanding payment will be adjusted to match the payment.

  Example:

  If there are 12 payments monthly each of 10 units of currency.

  If you were to record a payment of 25 units of currency then payments 1 and 2 would be marked as paid, payment 3 would be adjusted to 5 and be paid, and an additional payment for 5 units of currency would be added as payment 13, but with the same due date as payment 3.

18.6.4 Adding Payment Items to an Ad Hoc Payment

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

Adding a Payment Item to an Ad Hoc Payment

1. Choose a **Payment Category**.
2. Click on one of the **Payment Descriptions**.
3. In the **Net Amount** box enter a value (if the default is not correct).
4. Tick the **Add VAT** box to add VAT to the cost of the Payment Item. This is only visible if you have configured VAT.
5. Click **OK** to return to the Add a New payment Window

If there is no suitable Payment Item available

If there is no suitable Payment Item already available, click the **New** button and add a new Payment Item.

18.6.5 View a Payment

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

The View Payment window allows you to see details of a selected payment.

To view details of a Payment

1. On the **Accounting** Menu click **Payments** then click **View**.

2. Click one of the Payments to highlight it and click **OK** to display the details.

3. Tick the **Print Receipt** box if you wish to reprint a receipt for this payment, and click OK.

4. Tick the **E-mail Receipt** box if you wish to have a receipt e-mailed, and click OK

Notes:

- The Print Receipt and E-mail Receipt boxes by default are not ticked even if **Automatically Print Receipt for Payment Transactions** box or the **E-mail Receipts** box in the Accounting Options have been ticked.

18.6.6 Amend Payment Notes

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

The View Payment window allows you to see details of a selected payment.

To amend Payment Notes

1. On the **Accounting** Menu click **Payments** then click **Amend Note**.

2. Click one of the Payments to highlight it and click **OK** to display the current note.

3. Edit the note as required.

Notes:

- You may also get a list of Payments from the **Accounting** Places by clicking **All payments** or **Payments in Current Year**. Then if you click on the appropriate payment in the list to highlight it you may then right click with the mouse and select the **Amend Note** option.

18.6.7 Reprint a Receipt

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

If a member requires a copy of a payment receipt previously sent you can print a copy as follows.

1. On the **Accounting** Menu click **Payments** then click **Print Receipt**

2. Click one of the payments to highlight it and click **OK** to print the Receipt on the default printer.

Notes:

- You may also get a list of Payments from the **Accounting** Places by clicking **All payments** or **Payments in Current Year**. Then if you click on the appropriate payment in the list to highlight it you may then right click with the mouse and select the **Print Receipt** option and a copy of the receipt will be printed to your default printer.

- The status of the payments at the time of the print will be displayed. For example: a member is paying monthly and has paid a couple of payments these will show as paid and the remaining will be displayed as outstanding (or overdue if appropriate).

18.6.8 Reprint a range of Receipts

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

If you wish to print or re-print a set of receipts, you may print all receipts in a selected range.

Reprint a range of payment receipts

To reprint a range of receipts do the following:

1. On the **Accounting** menu, click **Payments** then click **Reprint a Range of Receipts**.

2. Select the receipt at the *start* of the range to be reprinted in the list. You may change the list sort order by clicking on a column header.

3. Click **Next >.**

4. Select the receipt at the *end* of the range to be reprinted in the list. You may change the list sort order by clicking on a column header.

5. Click **Finish**.

6. Choose the Printer to be used.

Notes:

- The status of the payments at the time of the print will be displayed. For example: a member is paying monthly and has paid a couple of payments these will show as paid and the remaining will be displayed as outstanding (or overdue if appropriate).

18.6.9 Resend a Receipt by E-mail

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

If a member requires an e-mail copy of a receipt previously sent you can e-mail a copy as follows.

1. On the **Accounting** Menu click **Payments** then click **E-mail Receipt**.

2. Click one of the payments to highlight it and click **OK**.

3. Now confirm the E-mail recipient details and enter a suitable message. Click **Send** and the e-mail will be sent with the receipt added as Portable Document File attachment.

Notes:

- You may also get a list of Payments from the **Accounting** Places by clicking **All payments** or **Payments in Current Year**. Then if you click on the appropriate payment in the list to highlight it you may then right click with the mouse and select the **E-mail Receipt** option and then you may confirm the E-mail recipient details and enter a suitable message. Click **Send** and the e-mail will be sent with the receipt added as Portable Document File attachment.

- The status of the payments at the time of the print will be displayed. For example: a member is paying monthly and has paid a couple of payments these will show as paid and the remaining will be displayed as outstanding (or overdue if appropriate).

18.6.10 Void a Payment

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

If a Payment has been recorded in error then you may void it. For Example if a payment has been recorded against the wrong member.

To Void a Payment

1. Do one of the following:

- Click **Accounting** menu, then **Payments**, then **Void**. Select a payment to void.

- On the Left Hand Task Pane, select **Accounting** place, then in the **All Payments** or **Payments in Current Year** list, select the payment, right-click and select **Void.**

2. Details of the Payment are displayed

3. Tick the **Print Receipt** box if you require a receipt to be printed.

4. Tick the **E-mail Receipt** box if if the receipt is to be sent by e-mail.

Notes:

- The Print Receipt box will be ticked if you have ticked the **Automatically Print Receipt for Payment Transactions** box in the Accounting Options.

- The E-mail Receipt box will be ticked if you have ticked the **E-mail Receipts** box in the Accounting Options.

18.6.11 Void Multiple Payments

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

If a number of Payments have been recorded in error then you may void them.

To Void multiple Payments

1. Do one of the following:

- Click **Accounting** menu, then **Payments**, then **Void Multiple Payments**.

- On the Left Hand Task Pane, select **Accounting** place, then in the **All Payments** or **Payments in Current Year** list, select the payment, right-click and select **Void Multiple Payments.**

2. A list of Payments that may be voided are displayed

3. Select the payments to be voided and click OK.

18.7 Refunds and Cancellations

18.7.1 Refund a Subscription or Invoice Payment

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

To refund a payment of Subscription or Invoice

1. Do one of the following:

   - Click **Accounting** menu, then **Subscriptions** or **Invoices**, then **Refund**. Select a Subscription or Invoice to refund.

   - On the Left Hand Task Pane, select **Accounting** place, then In the **All Subscriptions** or **All Invoices** lists, select a Subscription or Invoice, Right-click and select **Refund**.

2. The Refund a Subscription or Invoice window will be displayed

18.7.2 The Refund a Subscription or Invoice Window

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

If an Invoice has been paid in full or in part then you may refund it.

In other cases you may need to refund part of an Invoice for some reason.

To Refund a whole Subscription or Invoice

1. In the **Payment Method** list choose the method being used to make the refund payment.

2. Tick the **Print Receipt** box if a receipt is required.

3. Tick the **E-mail Receipt** box if the receipt is to be sent by e-mail.

4. The **Notes** box can be use to record any details you wish, e.g. reason for the refund.

Refund part of a Subscription or Invoice

1. In the **Payment Method** list choose the method being used to make the refund payment.

2. Tick the **Receipt Required** box if a receipt is required.

3. Enter in the **Amount to Refund** box the amount to be refunded. This may be any value up to the total of the amount paid.

4. The **Notes** box can be use to record any details you wish, e.g. reason for the refund.

Notes:

- The Print Receipt box will be ticked if you have ticked the **Automatically Print Receipt for Payment Transactions** box in the Accounting Options.

- The E-mail Receipt box will be ticked if you have ticked the **E-mail Receipts** box in the Accounting Options.

18.7.3 Refund a Payment

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

If a Payment needs to be refunded proceed as follows:

To Refund a Payment

1. Do one of the following:

- Click **Accounting** menu, then **Payments**, then **Refund**. Select a payment to refund.

- On the Left Hand Task Pane, select **Accounting** place, then in the **All Payments** or **Payments in Current Year** list, select the payment, right-click and select **Refund.**

2. Details of the Payment are displayed

3. In the **Payment Method** list choose the method being used to make the refund payment.

4. Tick the **Print Receipt** box if you require a receipt to be printed.

5. Tick the **E-mail Receipt** box if if the receipt is to be sent by e-mail.

6. The **Notes** box can be use to record any details you wish, e.g. reason for the refund.

Notes:

- The Print Receipt box will be ticked if you have ticked the **Automatically Print Receipt for Payment Transactions** box in the Accounting Options.

- The E-mail Receipt box will be ticked if you have ticked the **E-mail Receipts** box in the Accounting Options.

18.8 Account Balance and Transaction History

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

Each member is initially allocated an account balance of zero.

When a Subscription or Invoice is raised for a member their account balance is reduced and may then be a negative value.

When a payment is recorded the amount paid is added to the account balance. Once all outstanding subscriptions and/or invoices are paid a member's balance will be zero provided no ad-hoc payments have been recorded.

An ad-hoc payment may be used to increase a member's account balance. It is possible to include a positive account balance as a contribution to Subscriptions.

Where an organization has a subscription requirement for various payments at irregular periods through the year we recommend the use of an invoice rather than a subscription and then record Ad-hoc Payments as required.

Then by examining the member's account balance it is possible to determine if a member still has an outstanding amount to pay.

It is possible to adjust a member's account balance select Edit Member from the toolbar and then select the member in question, then click on the Subscriptions tab and enter the balance adjustment.

Transaction History

A member's transaction History may be viewed as follows:

From the **Players** Places click on **All Members**. Then if you click on the appropriate member in the list to highlight them you may then right click with the mouse and select the Transaction History option and a list of transactions for the member will be displayed.

You may then highlight an entry and right click and select a number of options.

Note

Some of the available options may not be applicable to the type of item selected. For example you cannot mark a payment as "paid". In these cases a message is displayed.

Transaction History report

A Transaction History report is also available. On the **Reports** menu select **Accounting Reports** then select **Transaction History**.

You may then select a single member. Then click OK

If you wish to view multiple records you may now change the selection criteria before viewing the report.

18.9   Exporting Subscriptions, Invoices, Payments or Competition Fees

> Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

Accounting records that are currently held within the HandicapMaster database can be exported to an external file using the Export facility.

The external file will be created in a 'Comma-separated file', suitable for importing into Microsoft Word or Excel.

It is also possible to restrict the export to the Current Accounting Year by selecting the option "Limit Export to Current Accounting Year"

Format of the Export File

The export file will be:

- an ASCII text file,

- one accounting entry per record in the file,

- a special 'Header' record will be the first record in the file (see below).

- each field within each record will be separated by a comma.

Header Records

There are four types of accounting data that may be exported. Subscriptions, Invoices, Payments and "immediate" Competition Fees. Each has a different 'Header' record.

The Subscription Header Record

The first record in the file will be a Header record. This consists of the names of each of the columns (fields) within the file. The fields will be ordered as follows:

Surname
Member's Surname

Middle Initials
Member's Middle Initials

First Name
Member's Given Name

Club Number
The Membership number or code for this member.

Member Category
The Membership category to which the member belongs to.

Age Group
The age group to which the member is assigned.

Gender
The gender of the member expressed as a single character of 'M' for Male or 'F' for Female.

Subscription Template

Name of the subscription template assigned to the member

Subscription Number
Unique number identifying the Subscription

Date Raised
The date the subscription was issued

Description
Description of the Subscription, may be blank

Net
Net Amount

VAT
VAT amount

Total
Total of Net + VAT

Status
Status of the Subscription e.g. Paid, Void, Overdue, etc.

Payment Start Date
Due date of the first (possible only) payment.

Number of Payments
The number of payments required to fully pay the Subscription

Notes
Notes (if any) added to the Subscription

Notes:

- If VAT is not enabled then the Net and VAT columns will not be included in the export

The Invoice Header Record

The first record in the file will be a Header record. This consists of the names of each of the columns (fields) within the file. The fields will be ordered as follows:

Surname
Member's Surname

Middle Initials
Member's Middle Initials

First Name
Member's Given Name

Club Number
The Membership number or code for this member.

Member Category
The Membership category to which the member belongs to.

Age Group
The age group to which the member is assigned.

Gender

The gender of the member expressed as a single character of 'M' for Male or 'F' for Female.

Invoice Template
Name of the invoice template used to raise the invoice

Invoice Number
Unique number identifying the Invoice

Date Raised
The date the Invoice was issued

Description
Description of the Invoice

Net
Net Amount

VAT
VAT amount

Total
Total of Net + VAT

Status
Status of the Invoice e.g. Paid, Void, Overdue, etc,

Payment Start Date
Due date of the first (possible only) payment.

Number of Payments
The number of payments required to fully pay the Invoice

Notes
Notes (if any) added to the Invoice

Notes:

- If VAT is not enabled then the Net and VAT columns will not be included in the export

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The Payments Header Record

The first record in the file will be a Header record. This consists of the names of each of the columns (fields) within the file. The fields will be ordered as follows:

Surname
Member's Surname

Middle Initials
Member's Middle Initials

First Name
Member's Given Name

Club Number
The Membership number or code for this member.

Member Category
The Membership category to which the member belongs to.

Age Group

The age group to which the member is assigned.

Gender
The gender of the member expressed as a single character of 'M' for Male or 'F' for Female.

Receipt Number
Unique number identifying the Payment

Date Paid
The date the Payment was recorded.

Payment Method
How the payment was paid e.g. Cheque, standing order, etc.

Description
Description of the Payment

Net
Net Amount

VAT
VAT amount

Total
Total of Net + VAT

Status
Status of the Payment e.g. Paid, Refund, Void, Cancelled.

Notes
Notes (if any) added to the Payment

Notes:

- If VAT is not enabled then the Net and VAT columns will not be included in the export

The Competition Fees Header Record

The first record in the file will be a Header record. This consists of the names of each of the columns (fields) within the file. The fields will be ordered as follows:

Surname
Member's Surname

Middle Initials
Member's Middle Initials

First Name
Member's Given Name

Club Number
The Membership number or code for this member.

Member Category
The Membership category to which the member belongs to.

Age Group
The age group to which the member is assigned.

Gender

The gender of the member expressed as a single character of 'M' for Male or 'F' for Female.

Transaction Number
Unique number identifying the competition fee

Date
The date competition fee was recorded.

Running Balance
The member's balance **after** the competition fee was processed

Amount
The value of the competition fee (gross value)

Type
Type of transaction. One of the following:

- In

- Out

- Balance Brought Forward

- Refund

Source
Location where transaction was performed. One of the following:

- HandicapMaster

- Player Entry

Description
A description of the transaction

Item ID
A reference number that identifies competition the fee relates to.

Item Description
A description of the fee

Notes
Notes (if any) added to the transaction

18.10 Reports

Subscriptions, Invoices and Payments are only available when the Subscriptions Option has been installed as a registered option. If these are not available, then the Subscriptions Option may not be installed.

A number of reports relating to subscriptions, Invoices and Payment are available.

Either:

1.   On the **Reports** menu, click **Accounting Reports**

or

2.   You may also get a list of reports from the **Reports** Places by clicking on the **Accounting** tab

Chapter

19

Correcting Mistakes

19   Correcting Mistakes

19.1   Introduction

Correcting errors and amending the presentation of competitions

Mistakes do happen. For example it is possible to apply the results of a competition, then realise that a scorecard had been missed.

This chapter describes how mistakes can be amended by using the 'Undo' option.

Contents

- The Undo Option

- Undoing a General Play Score

- Undoing and amending competition results

- Change the name of a Closed Competition

Related Topics

- Delete a score from an Opened Competition

19.2 Undo

HandicapMaster provides an Undo option. Selecting this option causes HandicapMaster to reverse out changes from the database. HandicapMaster will reverse out the item as chosen from the Events window. The type of changes which can be 'undone' are:-

- Competitions

- General Play Scores (May not be available in all regions due to regulatory restrictions.)

- Scores returned from external clubs (May not be available in all regions due to regulatory restrictions.)

To undo an event

1. Do one of the following:

   - On the **Competitions** Menu, choose **Undo** and select the event to Undo, or

   - On the Task/Explorer tab, click **Explorer** and then **All Handicapping Events**. Select the event and press **Delete** key.

19.3   Undoing a General Play Score

May not be available in all regions due to regulatory restrictions.

To Undo a General Play Score.

1. On the **Task/Explorer tab**, click **Explorer** and then in the **Handicapping** section select **General Play Scores (Completed)**

2. Select the **General Play Score** and press the `Delete` key on the Keyboard (or right-click and select **Undo**).

19.4   Undoing and amending competition results

It is possible to undo a competition which has previously been applied. This reverts the competition to the opened state. The competition is now found in the 'Opened Competitions' list. This gives you the following options:-

1. Selecting **Enter Scores** and entering additional scores (or amending ones already entered). Examples when this may be applicable would be to disqualify a competitor, or amending incorrectly entered scores.

2. Selecting **Config** allows you to change the template and competition set up attributes, including the name and date of the competition.

Having amended the competition scores or format, choose **Apply Scores** once again to reapply the competition scores to the database.

A closed competition can also be reversed into 'opened status' by using the right mouse click. Highlight a competition from the closed competitions list, right click and select **undo** option.

19.5   Change the Name of a Competition

To change the name of a closed (applied) competition - Stroke Play

1.   On the Left Hand Task Pane, select **Competitions** place

2.   Select **Closed Competitions**

3.   Select the competition to have its name changed and right-click.

4.   On the pop-up menu, select **Change Competition Name**.

If the competition is part of a multi-round or alternative day competition, the names of both the individual round and the overall competition may be changed.

To change the name of a Match Play competition

1.   On the Left Hand Task Pane, select **Competitions** place

2.   Select **Match Play Competitions**

3.   Select the competition to have its name changed and right-click.

4.   On the pop-up menu, select **Change Competition Name**.

Chapter

20

Publishing to Internet

20   Publishing to Internet

20.1   Introduction

A guide to connecting to, updating and using the HandicapMaster Master Scoreboard service, and National World Handicap System Platforms.

The following section describes how to update National World Handicap System Platforms, for those clubs in regions where a central World Handicap System is provided, and to Master Scoreboard web site for all customers.

Contents

- The Publish to Internet Wizard

- Online Score Entry configuration

- Master Scoreboard

- My Golf Ranking

20.2 The Publish to Internet Wizard

The Publish to Internet Wizard steps through the stages of publishing competition results and/or handicapping information to National web sites and Master Scoreboard.

Choose Internet Services

In the WHS Handicapping editions of HandicapMaster, the Publish to Internet wizard will display the 'Choose Internet Services' page when there is a choice of more than one internet service to publish to.

1. In the Choose Internet Services section select which internet service(s) you wish to publish to. Select from:

   - "England Golf WHS Platform" [for golf clubs in England]

   - "NGF Central Membership System" [for golf clubs in Holland]

   - "Master Scoreboard"

2. Click **Next >**.

Publish Results and Handicaps to MasterScoreboard.co.uk

1. Choose the options that you wish to use when publishing to Master Scoreboard. See Publish data to MasterScoreboard for more details.

2. Click **Next >**.

3. Start your Internet connection, then click **Next >** to start the publishing to Master Scoreboard.

Notes

Clubs in Wales, Ireland and Scotland do not have a publish to World Handicap System Platform option as these countries do not support the publishing of membership data.

Tournament Editions do not have a publish to World Handicap System Platform option as they do not manage club membership.

Scores can be republished by going to the Handicapping menu and selecting **Send scores to Handicapping Service to** Upload players' scores to the Handicapping Service. In normal operation HandicapMaster will send players scores in the background

20.3 Online Score Entry Configuration

Online Score Entry for General Play scores is available to customers operating the Cloud or Hosted editions of HandicapMaster (only).

The Online Score Entry Wizard allows the behaviour of the Score Entry pages on Master Scoreboard website to be customised.

Services

Tick the **Sign In** (*) box if you wish players to be able to sign in to competitions before play through the Master Scoreboard website.

Tick the **Enter Scores** box if you wish players to be able to enter their competition scores (along with options for displaying a Leader board, etc) through the Master Scoreboard website.

Tick the **Knock-Out Matches** box if you wish players to be able to view handicapping information and enter the results of their matches in match-play knock-out competitions through the Master Scoreboard website.

Options

Enter the minimum number of minutes that must pass between the time a player signs in and the time they may enter their score card in the **Minutes (minimum) between sign-in and score entry** box.

Tick the **Show notice that players must return a Scorecard** box if you wish to display the message *You will be required to return a Scorecard* on the score entry web page.

If you choose to show the notice, enter any specific instructions you would like to present to players in the **Instructions for returning a Scorecard (Physically or Electronically)** box. You may surround blocks of text with and to display the block in bold text. For example, replace 'This is important information' with 'This is important information' to highlight the word 'important'.

Tick the **Allow players to record KO match results as 'Other' or 'No Report'** box if you wish to allow your members to be able to enter a result of 'Other' or 'No Report' when reporting Match-play Knock-out match results.

Competition Entry Fee

If you have HandicapMaster Gold edition and are using the Competition Fee Purse in the Subscriptions Option you may elect to have competition entry fees deducted from player's competition purse.

Tick the **Deduct Entry Fee as players sign-in** box to activate deduction of the entry fee.

Click **Configure Settings** button to configure the parameters to use for this interface.

General Play Scores

Tick the **Players may enter General Play scores** box to enable players to be able to enter their General Play scores into the system.

Tick **Players must sign-in before play** box if you wish players to be required to sign in to the computer before they go out to play the General Play Score.

Tick one or both of the following options:

- **Men may enter scores**
- **Ladies may enter scores**

In the **Format** list, choose whether the scores will be scored as **Stableford** or **Regular Stroke Play**.

Note: Some Golf Union regulations make it mandatory to use Sign-in, and to make the format of scoring 'Regular Stroke Play'. In these cases, you will not be able to amend these settings.

On the next page:

In the **Players may play these courses to return General Play scores** list, tick the box alongside each course that it is OK for members to play to record their General Play scores.

On the next page:

in the **Players may play from these Tees** list, tick the box alongside each Tee colour that it is OK for members to play from when returning General Play scores. Selected Tee colours will only be offered to members if a course scorecard has been set up for their gender and for the chosen course and Tee colour.

Note: Some Golf Union regulations make it mandatory that all Home Courses and all Tees are made available to Players to return General Play scores. In these cases, you will not be offered these selections.

'Geofencing' of Scores

Some Golf Unions make it mandatory that sign-in and/or score entry for General Play scores must only be accepted where the player is located within a short distance of the golf course. In this circumstance, it is necessary for 'geofencing' (checking a player's location and restricting access to only devices located within a configured area) to be applied.

If these regulations apply in your area, you will need to supply the co-ordinates of the golf course (say Clubhouse) where your members will be returning General Play scores.

To view (on a map) or enter co-ordinates of your course, click **View and Update** button.

Notes:

Online score entry does not support the entering of scores as each hole is played on the course. Instead you should record your score as normal on a score card and at the end of the round you can enter your score card online.

20.4   Online Score Entry Configuration - Course Location

'Geofencing' of Scores

Some Golf Unions make it mandatory that sign-in and/or score entry for General Play scores must only be accepted where the player is located within a short distance of the golf course. In this circumstance, it is necessary for 'geofencing' (checking a player's location and restricting access to only devices located within a configured area) to be applied.

If these regulations apply in your area, you will need to supply the co-ordinates of the golf course (say Clubhouse) where your members will be returning General Play scores.

If you do not have any co-ordinates configured, HandicapMaster will attempt to locate these based upon a search using your organisation name. If this search matches against more than one item, select the most applicable item from the list and click **OK**.

Check the location (shown with a green dot in the middle of the map) is applicable for your golf course.

To enter or change the configured location of your course

When a map is displayed. use the red control buttons to move the dot around the map to best place this location. Use the Zoom-In and Zoom-Out (+ and – buttons) as required.

If no co-ordinates have been found, you may search for these using Google Maps and enter these into the applicable boxes. When you have two values entered, press TAB key and a Map will be displayed.

If no co-ordinates have been suggested or entered

You may find the co-ordinates of your course by referring to the Google Maps facility. Search for your course on Google Maps. When you have located it, right-click over your chosen point on the map and Google will display the co-ordinates of that point at the top of a pop-up menu,

Enter these values into HandicapMaster. When you have added both values and have moved from the second box, a map will be displayed confirming the entered location.

20.5   Master Scoreboard

20.5.1   Introduction

The Master Scoreboard web site is the online extension of HandicapMaster that helps you publish Handicaps, Competition Results and Handicap Records online.

The following section describes the Master Scoreboard service.

Contents

- About Master Scoreboard

- Request set up on Master Scoreboard

- Upload data to Master Scoreboard

- Stop a Member's Name showing on Master Scoreboard

- Reset a member's password on Master Scoreboard

- Stop a Competition showing on Master Scoreboard

- Stop a Knock Out Draw showing on Master Scoreboard

- Stop an Eclectic showing on Master Scoreboard

- Stop an Order of Merit showing on Master Scoreboard

- Display the Player Entry leaderboard on the website

- Display Notices on the Master Scoreboard website

See Also

- Accept Bookings into future competitions through Master Scoreboard ("Online Bookings")

- Stop a Group Booking being included in a Fixture List

- Stop a Calendar Note being included in a Fixture List

20.5.2   About Master Scoreboard

The **MasterScoreboard.co.uk** service offers Users the opportunity to publish Handicaps, Competition Results and Handicap Records to the Internet.

Through the central web site at https://www.MasterScoreboard.co.uk, Users may publish results and handicaps directly from HandicapMaster to the central web site. This allows members to see results from competitions and latest handicap lists without having to visit the Clubhouse to read printed notices on a board.

The website is also available at https://www.MasterScoreboard.ie.

The pages on the MasterScoreboard.co.uk web site are password protected (making them 'Member-only' pages)*.

Events and Notices may be added to the central web site, allowing Secretaries to contact those members who do not visit the clubhouse and do not see the notices listed there. Events may be

flagged as 'Open' allowing all MasterScoreboard.co.uk web site visitors to read the details. An email address can optionally be supplied allowing web site visitors to contact the organising official.

Individual members names may be masked should a member wish not to have their names listed on the web site.

* Some existing clubs may have a 'No Password' option which is historic. Once a password option is selected this option is no longer available and all the data is password protected..

20.5.3 Request set up on Master Scoreboard

In order to upload from HandicapMaster to Master Scoreboard, it is necessary to request being set up on the Master Scoreboard service.

As a result of being set up on Master Scoreboard, an ID and Passcode will be provided that must be used in HandicapMaster to connect to Master Scoreboard.

To request setup on Master Scoreboard

1. Do one of the following:

    - On the main Toolbar, click the **Publish** button, or

    - On the **File** menu, click **Publish to Internet...**

2. Click **Next >** button.

3. Tick **Master Scoreboard** box and click Next.

4. In the Connection Settings section, click on the **Request Set-up** button to start the registration request form. If the ID in the Connection Settings is not "0", your club has already published to Master Scoreboard and a registration request is not required. In this case, the **Request Set-up** button is not shown.

5. On the request form, enter the contact name and email address for the registration and the name of the club to use on Master Scoreboard (this will be initially set to the licenced club name, but may be amended if necessary). These fields cannot be left blank.

6. If your club uses multiple databases for different sections, a separate registration is required for each section. In this case, tick the box to indicate a section registration and then enter the section name in the additional field that is now shown. The section name will be incorporated into the Master Scoreboard name during set-up. If a section registration is selected, the section name cannot be left blank.

7. If you have any further information which is relevant to the registration process, enter details in the Notes field.

8. Click the **Send** button. This will send an email message to HandicapMaster Support staff containing the details entered on the form. The name from the HandicapMaster licence are also included, along with an indication of the handicapping type (to ensure the correct set-up on Master Scoreboard). A copy of the request email is sent to the contact email address.

9. The registration request is now complete. In the Publish to Internet wizard, click the **Cancel** button to abort publishing to Master Scoreboard.

10. When the registration request has been processed by HandicapMaster Support staff, the specified contact will receive a "Welcome" message giving the ID and Passcode for Master Scoreboard and further instructions for using the service. The ID and Passcode are required when running the

Publish to Internet wizard to upload data from HandicapMaster .

Notes:

- If your club has already published to Master Scoreboard, but the ID and Passcode have been lost or forgotten, please contact HandicapMaster Support staff..

20.5.4 Publish data to Master Scoreboard

Before uploading data to Master Scoreboard, it is necessary for an ID and Passcode to be supplied. For more information, see Request set up on MasterScoreboard.co.uk.

To upload to Master Scoreboard

1. Do one of the following:

   - On the main Toolbar, click the **Publish** button, or

   - On the **File** menu, click **Publish to Internet...**

2. Click **Next >** button.

3. Tick **Master Scoreboard** box and click Next.

4. In the Connection Settings section, enter the **ID** and **Passcode** that have been supplied for the service.

5. In the Options section, tick the **Declare Information was correct up to ...** box if the information you are publishing may not be fully up to date (and enter the date when the data was correct).

6. in the Options section, tick the **Publish to MyGolfRanking** box if you wish the competition scores to be made available to the MyGolfRanking system. For more information about this external service, see About My Golf Ranking.

7. Click **Next >** button.

8. If you have created one or more Start Sheets, tick the box alongside those competition **Start Sheets** you wish to display or continue to display in the Master Scoreboard website. Click **Next >** button.

9. Start your Internet connection and, once you have verified that your Computer is connected to the Internet, click **Next >** button.

10. Click **Finish** button.

Notes:

- Each time data is uploaded to MasterScoreboard.co.uk, all of the previous competition and handicap data is deleted and replaced with new data being uploaded.

See Also

- Request set up on MasterScoreboard.co.uk

- About My Golf Ranking

20.5.5 Stop a Member's Name showing on Master Scoreboard

Where a Member would prefer their name not to be displayed on the Master Scoreboard. web site, it is possible for to mask their name using their membership number.

To stop a member's name being displayed on Master Scoreboard

1. On the **Players** menu, click **Edit Member** and select the applicable Member:

2. Click the **Master Scoreboard** tab.

3. Tick the **Hide Name of Member using 'Name Withheld'** box.

4. Click **OK**.

5. Re-publish to Master Scoreboard, for this change to be actioned.

See Also

- Reset a member's password on Master Scoreboard

20.5.6 Reset a Member's Password on Master Scoreboard

You may reset (clear) a member's password for the MasterScoreboard.co.uk web site, where you have the Master Scoreboard 'Individual Passwords' feature activated.

To reset a member's password on MasterScoreboard.co.uk

1. On the **Players** menu, click **Edit Member** and select the applicable Member:

2. Click the **Master Scoreboard** tab.

3. Click the **Reset player's password on Master Scoreboard** link.

See Also

- Stop a Member's Name showing on Master Scoreboard

20.5.7 Stop a Competition showing on Master Scoreboard

To stop a stroke-play competition being displayed in results list on Master Scoreboard

1. On the Left Hand Task Pane, select **Competitions** place

2. Select **Closed Competitions**

3. Select the competition to be included or excluded from Master Scoreboard and right-click.

4. On the pop-up menu, select **MasterScoreboard.co.uk**.

To stop a future stroke-play competition being included in a Fixture List

1. On the Left Hand Task Pane, select **Competitions** place

2. Select **Opened Competitions**

3. Select the competition to be included or excluded from Master Scoreboard and right-click.

4. On the pop-up menu, select **Fixture List**.

Notes:

- Repeat this action to reverse whether HandicapMaster will publish this competition to Master Scoreboard.

- Where all handicap information is being uploaded (see options section in Upload data to MasterScoreboard.co.uk) stopping the competition being published will only prevent the competition being displayed as a link to the competition results. Individual Player History records will still show the competition score for the player.

See Also

- Stop a Knock-out Draw showing on Master Scoreboard

- Stop an Eclectic showing on Master Scoreboard

- Stop an Order of Merit showing on Master Scoreboard

- Stop a Best of Series Showing on Master Scoreboard

- Stop a Number of Good Holes Played Report Showing on Master Scoreboard

- Stop a Group Booking being included in a Fixture List

- Stop a Calendar Note being included in a Fixture List

20.5.8   Stop a Match Play Draw showing on Master Scoreboard

To stop a Match Play Draw being displayed on MasterScoreboard.co.uk

1. On the Left Hand Task Pane, select **Competitions** place

2. Select **Match Play Competitions**

3. Select the competition to be included or excluded from MasterScoreboard.co.uk and right-click.

4. On the pop-up menu, select **MasterScoreboard.co.uk**.

Notes:

- Repeat this action to reverse whether HandicapMaster will publish this K.O. draw to MasterScoreboard.co.uk.

See Also

- Stop a Competition showing on Master Scoreboard

- Stop an Eclectic showing on Master Scoreboard

- Stop an Order of Merit showing on Master Scoreboard

- Stop a Best of Series Showing on Master Scoreboard

- Stop a Number of Good Holes Played Report Showing on Master Scoreboard

- [Stop a Competition being included in a Fixture List](#)

- [Stop a Group Booking being included in a Fixture List](#)

- [Stop a Calendar Note being included in a Fixture List](#)

20.5.9 Stop an Eclectic showing on Master Scoreboard

To stop an Eclectic Competition being displayed on Master Scoreboard

1.   On the Left Hand Task Pane, select **Competitions** place

2.   Select **Eclectic Competitions**

3.   Select the competition to be included or excluded from Master Scoreboard and right-click.

4.   On the pop-up menu, select **MasterScoreboard.co.uk**.

Notes:

- Repeat this action to reverse whether HandicapMaster will publish this Eclectic to MasterScoreboard.co.uk

See Also

- [Stop a Competition showing on Master Scoreboard](#)

- [Stop a Match Play Draw showing on Master Scoreboard](#)

- [Stop an Order of Merit showing on Master Scoreboard](#)

- [Stop a Best of Series Showing on Master Scoreboard](#)

- [Stop a Number of Good Holes Played Report Showing on Master Scoreboard](#)

- [Stop a Competition being included in a Fixture List](#)

- [Stop a Group Booking being included in a Fixture List](#)

- [Stop a Calendar Note being included in a Fixture List](#)

20.5.10 Stop an Order of Merit showing on Master Scoreboard

To stop an Order of Merit Competition being displayed on Master Scoreboard

1.   On the Left Hand Task Pane, select **Competitions** place

2.   Select **Order of Merit Competitions**

3.   Select the competition to be included or excluded from MasterScoreboard.co.uk and right-click.

4.   On the pop-up menu, select **MasterScoreboard.co.uk**.

Notes:

- Repeat this action to reverse whether HandicapMaster will publish this Order of Merit to MasterScoreboard.co.uk.

See Also

- Stop a Competition showing on Master Scoreboard
- Stop a Knock-out Draw showing on Master Scoreboard
- Stop an Eclectic showing on Master Scoreboard
- Stop a Best of Series Showing on Master Scoreboard
- Stop a Number of Good Holes Played Report Showing on Master Scoreboard
- Stop a Competition being included in a Fixture List
- Stop a Group Booking being included in a Fixture List
- Stop a Calendar Note being included in a Fixture List

20.5.11 Stop a Best of Series Showing on Master Scoreboard

To stop a Best of Series being displayed on Master Scoreboard

1.   On the Left Hand Task Pane, select **Competitions** place

2.   Select **Best of Series**

3.   Select the competition to be included or excluded from MasterScoreboard.co.uk and right-click.

4.   On the pop-up menu, select **MasterScoreboard.co.uk**.

Notes:

- Repeat this action to reverse whether HandicapMaster will publish this Best of Series to MasterScoreboard.co.uk.

See Also

- Stop a Competition showing on Master Scoreboard
- Stop a Knock-out Draw showing on Master Scoreboard
- Stop an Eclectic showing on Master Scoreboard
- Stop an Order of Merit showing on Master Scoreboard
- Stop a Number of Good Holes Played Report Showing on Master Scoreboard
- Stop a Competition being included in a Fixture List
- Stop a Group Booking being included in a Fixture List

- Stop a Calendar Note being included in a Fixture List

20.5.12 Stop a Number of Good Holes Report Showing on Master Scoreboard

To stop a Number of Good Holes Report being displayed on Master Scoreboard

1. On the **REPORTS** menu select **COMPETITION REPORTS**

2. Select **Number of Good Holes Played**

3. Select the report to be included or excluded from MasterScoreboard.co.uk and right-click.

4. On the pop-up menu, select **MasterScoreboard.co.uk**.

Notes:

- Repeat this action to reverse whether HandicapMaster will publish this Number of Good Holes Played report to MasterScoreboard.co.uk.

See Also

- Stop a Competition showing on Master Scoreboard

- Stop a Knock-out Draw showing on Master Scoreboard

- Stop an Eclectic showing on Master Scoreboard

- Stop an Order of Merit showing on Master Scoreboard

- Stop a Competition being included in a Fixture List

- Stop a Group Booking being included in a Fixture List

- Stop a Calendar Note being included in a Fixture List

20.5.13 Display the Player Entry leaderboard on the website

When running the Leader board in Player Entry, you may elect to also have the scores published to Master Scoreboard. This would allow your members to view the live scoring online.

To turn on publishing of the leader board to Master Scoreboard

1. In the Player Entry Configuration Wizard, tick the **Publish scores to Master Scoreboard when Leaderboard displayed** box.

2. Run a Leader board onscreen whilst your competitions are underway.

Notes:

- You will need a Master Scoreboard account to be able to publish live scores to the website.

- Scores are only published whilst the leader board is being displayed on screen (i.e. Player Entry is operating).

- Scores will be published approximately every 3 minutes to the website, whilst the leader board is

being displayed on screen. This frequency drops to approximately every 10 minutes between the hours of Midnight and 6am.

- Scores will only be displayed on the website if they have been updated within the last 60 minutes. If no update is received for longer than this period, the live scoring will be turned off on the website.

20.5.14 Club Notices

20.5.14.1 Introduction - Club Notices

Club Notices are notices of information (such as news items) that may be published on the Master Scoreboard website.

You may add and update these notices either through HandicapMaster or through the Master Scoreboard website control panel.

When you add them using the *Club Website* program, you have the choice of adding the Notices to the "Public" web pages or to the Members' Area.

See Also:

- Add a new Notice

- Edit an existing Notice

- Delete a Notice

20.5.14.2 Add a new Notice

To add a notice to the website:

1. In the left-hand column, in the *Places* box click **Players**.

2. In the right-hand pane, double-click **Notices**.

3. Do one of the following:

   - In the left-hand column, click **Add a New Notice**, or

   - Press the INSERT Key on the keyboard.

4. In the **Posted By** box, enter your name to identify you as the person posting the notice.

5. In the **Expire Notice On** box, select the date that you would like the notice to automatically be removed from the website.

6. Enter the details of the notice in the **Notice** box.

7. Click **OK** to save the notice.

Notes

- As soon as you click OK button, the notice will be added to the website.

- You may enter Notices visible to members when they log into Master Scoreboard. If you are using the *Club Website* product, you may also enter 'public' notices.

See Also:

- Edit an existing Notice

- Delete a Notice

20.5.14.3 Edit an existing Notice

To edit an existing notice:

1. In the left-hand column, in the *Places* box click **Players**.

2. In the right-hand pane, double-click **Notices**.

3. Double-click the notice to be edited in the right-hand pane.

4. In the **Posted By** box, enter your name to identify you as the person posting the notice.

5. In the **Expire Notice On** box, select the date that you would like the notice to automatically be removed from the website.

6. Enter the details of the notice in the **Notice** box.

7. Click **OK** to save the notice.

Notes

- As soon as you click OK button, the notice will be updated on the website.

- You may enter Notices visible to members when they log into Master Scoreboard. If you are using the *Club Website* product, you may also enter 'public' notices.

See Also:

- Add a new Notice

- Delete a Notice

20.5.14.4 Delete a Notice

To delete a notice:

1. In the left-hand column, in the *Places* box click **Players**.

2. In the right-hand pane, double-click **Notices**.

3. Highlight the notice to be deleted in the right-hand pane with a single click.

4. Do one of the following:

    - In the left-hand column, click **Delete Notice**, or

    - Press the DELETE Key on the keyboard.

Notes

- As soon as you click YES button, the notice will be removed from the website.

See Also:

- [Add a new Notice](#)

- [Edit an existing Notice](#)

20.6   My Golf Ranking

20.6.1   About My Golf Ranking

MY
GOLF
RANKING

The My Golf Ranking web site is an external web site that ranks players based upon their competition results, within their club, county and nationally.

You may publish competition results from HandicapMaster to this service.

Your club will need an account on the My Golf Ranking system before it can publish competition results to the service, and have it's players ranked.

Visit the www.MyGolfRanking.net web site to register your club on the system.

About My Golf Ranking

MyGolfRanking provides players at participating golf clubs with a ranking based on their performance in counting events nominated by their club.

MyGolfRanking is the concept of David Moir, past president of the Scottish Golf Union, who was instrumental in devising the R&A/USGA World Amateur Golf Ranking for men and women.

How My Golf Ranking works

Each golf club must inform its members in advance which Stroke play and Stableford club events during the year are Counting Events and players earn Ranking Points based on their net scores and Bonus Points for finishing in a high position in an event.

Each competition is rated for strength on the basis of the number of competitors in the starting field. The larger the field, the more Bonus Points can be won.

Each player's Ranking Points and Bonus Points are added together and divided by the Divisor, which equates to the number of Counting Rounds that the player has played. This figure is multiplied by 100 to give the player's MyGolfRanking Points.

The MyGolfRanking Points are then used to rank each player at Club, County and National level.

The MyGolfRanking lists will be updated each week and posted on the www.MyGolfRanking.net website

Notes

• The My Golf Ranking web site is an external web site and is not operated by HandicapMaster Ltd.

See Also

• Publish results to My Golf Ranking

20.6.2   Publish results to My Golf Ranking

You may update the information on the My Golf Ranking at any time. This will allow you to add new scores to the system.

To update My Golf Ranking

1. Publish to the Master Scoreboard web site by running the Publish to Internet wizard.

2. When running the *Publish to Internet* wizard, tick **Publish to MyGolfRanking** box.

Notes:

- The data published to Master Scoreboard will be collected and processed by My Golf Ranking overnight.

- The following competition formats are *NOT* supported by the MyGolfRanking system and results for these types of competitions *cannot* be published:

    - Par/Bogey format competitions

    - Team Competitions

    - Overall results from Multiple Round competitions (I.e. 36 hole, 72 hole, etc)

    - Competitions with less than three competitors

See Also

- About My Golf Ranking

Chapter

21

Managing the Database

21 Managing the Database

21.1 Introduction

Daily and 'End-of-Year' functions for the successful operation of HandicapMaster.

This Chapter deals with two opposite but vital functions of running the HandicapMaster system. These are

1. Removal of out-of-date data (a process called 'Housekeeping')

2. Preservation of current, valid, data avoiding accidental loss.

Housekeeping is required when the HandicapMaster database is becoming too large to manage efficiently. Often, this function is performed as an 'end-of-year' task.

Preservation of the important data involves regular backups to ensure against hardware or software malfunction. Typically, this function is performed each time HandicapMaster is operated.

Contents

- The function of Housekeeping
- Protection of the data
- Backing up the Database
- Restoring the Database
- Automatic Backups
- Using more than one copy of HandicapMaster on the same computer

21.2 The function of Housekeeping

Housekeeping is a necessary function of running HandicapMaster. Housekeeping involves removing out-of-date data in order that the database is maintained at a size that is practical to use.

Housekeeping involves a number of different functions. These are

1. Removing the playing record entries. This removes the competition records of members up to a pre-described date and also handicap record entries. This option is typically used at the end of each season.

2. Removing Accounting Entries. This removes the accounting and subscriptions records of members up to a pre-described date (if this option is in use in HandicapMaster).

3. Removing any Deleted Members or Visitors from the database. This removes the names of past members which have been marked as deleted or Visitors which no longer have any references within the database. Names can only be deleted if there are no competition records referring to them.

A separate option offers the erasure of Personal data to meet the General Data Protection Regulation (GDPR).

To perform Housekeeping

1. On the **File** menu, click **Housekeeping**.

2. Choose between housekeeping your data using the **recommended** settings or **custom** choices of your own, or **GDPR Data Erasure**.

Recommended

The **recommended** settings will remove Handicap/Competition Entries (and Accounting entries if used) older than four years. In addition, all past Members and Visitors left with no competition data or accounting data will also be removed.

When deleting Handicap records, a minimum of 25 entries will be left for each player.

Custom

To perform any one of the housekeeping functions described above, follow the instructions detailed below:

Deleted Members or Visitors

1. Check the **Remove Past Members and Past Visitors box**.

Playing Record Entries

1. Check the **Remove Competition record and Handicap record entries up to a chosen date** box. May not be available in all regions due to regulatory restrictions.

2. On the next page of the Housekeeping Wizard, set the **Remove all selected data to the the end of** box to the date the deletions should be up to.

When deleting Handicap records, a minimum of 25 entries will be left for each player.

Accounting Record Entries

1. Check the **Remove Voided Transactions up to a chosen date** box if you wish to remove void transactions. For example after a running the Raise Subscription Wizard you may find some changes required. When you re-run the Raise Subscription Wizard the previous

subscriptions will be voided. This option allows you to remove these 'voided' records if required.

2. Check the **Remove Subscription and Payment Records up to a chosen date** box.

3. On the next page of the Housekeeping Wizard, set the **Remove all selected data to the the end of** box to the date the deletions should be up to.

GDPR Data Erasure

This option allows the erasure of a past member or past visitor's personal information to meet the General Data Protection Regulation (GDPR).

Click **Select Players to have personal Data Erased**

Tick the box along side the players who require personal data to be erased, then proceed through the wizard.

Note

The accounting data will only be available to be removed if the user in HandicapMaster has full access or if Custom access is enabled then 'update' access to the accounting data is required.

21.3   Protection of the data

All computer data is liable to loss or corruption either from hardware failure (such as a disk drive failing) or from software errors (causing the program or operating system to 'crash') that can result in the database becoming corrupt. Another example of protection is the mis-entry of data that subsequently requires removal. HandicapMaster provides four levels of protection against all of these types of problems. These are

1. Correcting mistakes made by the User,

2. Recovery of data following a system crash whilst processing competition scores and

3. Physical Backup of data to another drive or directory and Restore of data from another drive or directory.

4. Online backup and restore of data to/from HM-SAFE online storage

The first of these has already been discussed in the section Correcting Mistakes previously in this guide. The rest of this section deals with the second and third of these.

Processing Competition Scores

Competition processing is the most regular and processing-intensive operation that HandicapMaster has to perform. For this reason, this is the most likely scenario when a system (hardware) crash or software failure would leave the database corrupt. HandicapMaster has been designed in a way that ensures the changes made as a result of competition processing are protected by being backed up whilst the changes are processed. These backups are automatically deleted once the changes have been completed. This enables HandicapMaster to recognize when scores have not been completed (since the backups will exist) and backup out the changes if necessary. HandicapMaster automatically checks whether a competition backup was underway when HandicapMaster stopped each time it is started.

21.4   Backing up the Database

This section only applies where the HandicapMaster database is on-premises, and does NOT apply to cloud databases

HandicapMaster will automatically prompt the User to backup the database at the end of each session. In addition, HandicapMaster will copy the database to a 'backup' directory on the same drive as HandicapMaster itself every time HandicapMaster is exited. It is recommended that you do not rely on the automatic backups in case of the event of a failure of the disk HandicapMaster is installed on. In this circumstance, the automatic backups will also be lost.

To backup the database

1.   On the **File** menu, click **Backup Database**.

2.   Click **Change Folder** to locate a suitable folder for the Backup File. A compressed copy of the database will be written to this folder.

3.   Tick the **Remind To Back Up On Close** box to cause this window to automatically be displayed when exiting from HandicapMaster (Not applicable when HandicapMaster uses SQL Server database technology.

4.   Click **Yes** to perform the backup, or **No** to bypass the backup operation.

HandicapMaster creates a backup file called HandicapMaster.bak. or where HandicapMaster uses SQL Server database technology the name is HandicapMaster.sql.bak

Notes:

- **It is strongly recommended that the Folder is on a different Drive to where HandicapMaster is installed.**

- The database is written in a format that is unique to HandicapMaster an cannot be restored other than using HandicapMaster.

- If you are in the process of exiting from HandicapMaster, selecting Cancel will also cancel the exit and return you to HandicapMaster.

- Click the **Online Backup** button if you wish to perform an Online Backup.

TIP: It is recommended that the backup be performed to an alternative disk such as a removable drive or USB memory stick. This will ensure you have the maximum likelihood of protecting data from loss (such as theft of the computer, etc.). IMPORTANT do not store the backup media with the computer, but store at a separate location.

See Also

- Protection of the Database

- Restore of the Database

21.5   Restoring the Database

This section only applies where the HandicapMaster database is on-premises, and does NOT apply to cloud databases

To recover the database from a previous backup

1. On the **File** menu, click **Restore Database**.

2. Click **Change Folder** to locate the disk and folder containing the backup file.

3. Click **Yes** to perform the restore, or **No** to bypass the restore operation.

Notes:

HandicapMaster expects to find a backup of the database which has been taken using HandicapMaster itself (i.e. a compressed copy). The file is called HandicapMaster.bak or where HandicapMaster uses SQL Server database technology the name is HandicapMaster.sql.bak

Click the **Online Restore** button if you wish to perform an Online Restore.

See Also

*   Protection of the Database

*   Backing up the Database

21.6 Automatic Backups

21.6.1 Introduction

This section only applies where the HandicapMaster database is on-premises, and does NOT apply to cloud databases

In addition to the Backup Database option available, HandicapMaster also retains copies of the database file each time HandicapMaster is exited (if the data has changed).

On exit, and at other selected times, HandicapMaster copies the database to a directory called BACKUP created within the folder where HandicapMaster has been installed.

Note: Where HandicapMaster uses SQL Server database technology then automatic backups when exiting are taken on a periodic basis. If when exiting HandicapMaster the previous automatic backup was taken more than 3 days earlier then a fresh automatic backup is taken.

Where HandicapMaster is database is on-premises and does NOT use SQL Server database technology HandicapMaster copies the database file (Handicap.Mdb) to a file of name "Handic<nn>. Mdb" where <nn> is an increasing sequential number. By default, this number is up to 5. Once all five have been created, copy number 1 is overwritten on the next occasion (and so forth).

Where HandicapMaster is database is on-premises and uses SQL Server database technology HandicapMaster copies the database file (HandicapMaster.mdf) to a file of name "HandicapMaster. sql.<nn>.bak" where <nn> is an increasing sequential number. This number is up to 5. Once all five have been created, copy number 1 is overwritten on the next occasion (and so forth).

These copies can then be used to recover HandicapMaster in the situation that the database file is lost or becomes damaged.

These copies are called 'Automatic Backups'.

Important Note

The 'automatic backups' must not be relied on to safe store your HandicapMaster data. Where HandicapMaster is database is on-premises and does NOT use SQL Server database technology HandicapMaster the automatic backup files are saved to the same hard disk as HandicapMaster itself. In the event of a hard drive failure, or loss of the PC, your data will be lost.

Where the HandicapMaster database is on-premises and uses SQL Server database technology it is possible at installation time to choose a different hard disk (if available) for the location of the automatic backups.

Always ensure you take regular backups away from the HandicapMaster PC using Backup Database option.

Contents

- Restoring the Database from an Automatic Backup

- Change the number of Automatic Backups retained

21.6.2   Restoring the Database from an Automatic Backup

This section only applies where the HandicapMaster database is on-premises, and does NOT apply to cloud databases

To recover the database from an Automatic Backup

1.   On the **File** menu, click **Options**.

2.   Click the **Database** tab.

3.   Click **Restore from Automatic Backups** button.

4.   Select the applicable backup you wish to restore from in the **Available Backup Files** list.

5.   Click **Restore Database**.

Important Note

The 'automatic backups' must not be relied on to safe store your HandicapMaster data. The automatic backup files are saved to the same hard disk as HandicapMaster itself. In the event of a hard drive failure, or loss of the PC, your data will be lost.

Always ensure you take regular backups away from the HandicapMaster PC using Backup Database option.

21.6.3   Change the number of Automatic Backups retained

This section only applies where the HandicapMaster database is on-premises, and does NOT apply to cloud databases

To change the number of Automatic Backups retained by the system

(Not applicable where HandicapMaster database is on-premises and uses SQL Server database technology)

1.   On the **File** menu, click **Options.**

2.   Click the **Database** tab**.**

3.   In the **Number of Automatic Backups held in BACKUP directory** box, enter the required number. The valid range for this setting is from 0 (zero - no automatic copies) to 99 inclusive.

Important Note

The 'automatic backups' must not be relied on to safe store your HandicapMaster data. The automatic backup files are saved to the same hard disk as HandicapMaster itself. In the event of a hard drive failure, or loss of the PC, your data will be lost.

Always ensure you take regular backups away from the HandicapMaster PC using Backup Database option.

21.7   Using more than one copy of HandicapMaster

21.7.1   Introduction

This facility allows you to manage multiple HandicapMaster databases, in effect running more than one copy of HandicapMaster on the same computer.

HandicapMaster from Version 7 onwards supports a range of database products.

For each database an entry is defined that contains the information required to access that database. This information is used at the start up of HandicapMaster to present the user with a list of databases to access, when two or more are configured.

Contents

- Create two copies of HandicapMaster on the same Computer.

- Add or modify the Databases used

- Share a Database between different Users on the Computer

21.7.2   Create two copies of HandicapMaster on the same Computer

This section only applies where the HandicapMaster database is on-premises, and does NOT apply to cloud databases

For a cloud database please contact HandicapMaster support for further advice and assistance.

To create a second copy of HandicapMaster

Where HandicapMaster is database is on-premises and does NOT use SQL Server database technology HandicapMaster

1. On the **File** menu, click **Options.**

2. Click the **Database** tab**.**

3. Click the **Configure...** button.

4. Click **New...** button and run the The Database Wizard.

Where HandicapMaster is database is on-premises and uses SQL Server database technology

1. It is assumed that a new instance of the HandicapMaster database has been created in the local SQL Server. Please contact HandicapMaster support for further advice and assistance in creating a new SQL server database. Once the database has been created then it may be added to existing handi configurations as follows:

2. On the **File** menu, click **Options.**

3. Click the **Database** tab**.**

4. Click the **Configure...** button.

5. Click **New...** button and run the The Database Wizard.

6. Select **Network Edition** and configure the SQL Server database information.

21.7.3 Add or modify the Databases

To add to the list of Databases available

1. On the **File** menu, click **Options.**

2. Click the **Database** tab**.**

3. Click the **Configure...** button.

4. Click **New...** button and run the [The Database Wizard](#).

To modify the list of Databases available

1. On the **File** menu, click **Options.**

2. Click the **Database** tab**.**

3. Click the **Configure...** button.

4. Click **Settings...** or **Remove** buttons as required.

21.7.4 Share a Database between different Users

This section only applies where the HandicapMaster database is on-premises, and does NOT apply to cloud databases

If you wish to share access to a HandicapMaster database file between different Windows Users on the same Computer, then create a shared database, then add this shared database to the configuration of other HandicapMaster Users on the Computer.

To configure a shared Database file

1. On the **File** menu, click **Options.**

2. Click the **Database** tab**.**

3. Click the **Configure...** button.

4. Click **New...** button and run the [The Database Wizard](#). Use the option to **Share** a database when creating the new Database file. Complete the Database Wizard to create the Shared Database.

5. For each of the other users on the computer who require access to this Database, start HandicapMaster and configure the Shared database as follows:

   a. On the **File** menu, click **Options.**

   b. Click the **Database** tab**.**

   c. Click the **Configure...** button.

   d. Click **New...** button and run the [The Database Wizard](#).

      i. Use the option **None (Locate existing Database)**.

      ii. Highlight the shared database in the list. This will be a database in the "All Users" or "Public" folder.

      iii. Complete the Database Wizard to create the Shared Database.

21.7.5 Database Configuration

The Database Configuration Utility allows you to manage multiple HandicapMaster databases, in effect running more than one copy of HandicapMaster on the same computer.

New button

This allows you to add a new Database entry to the list.

Settings button

This allows you to amend details of the currently selected entry in the list.

Remove button

This allows you to remove the currently selected Database entry from the list.

Note removal from the list does NOT delete the underlying Database file, except in some circumstances.

Up and Down buttons

These buttons, represented by Up and Down arrows, allow the ordering of databases in the list to be modified.

21.7.6 The Database Wizard

HandicapMaster **Edition**

Choose either **Cloud or SQL Server** or **Single computer**.

Single computer will create an Access Database file.

Cloud or SQL Server edition will allow a Cloud or local SQL Server Database to be configured to HandicapMaster (see Cloud or SQL Server Database Configuration below).

Create

Choose the Database to create. Select

- **New database** to create a new, empty database file. Tis will allow you to start afresh with an empty HandicapMaster database.

- **Copy existing database** to make a copy of a HandicapMaster Database you are already using. On the **Database to Copy** page, select the existing database to be used.

- **Locate existing database** to configure a database file that already exists. On the **Locate existing Database** page, highlight the Database file to be used. If the file is not listed, click **Find** button to locate and add the required database file to the list.

Share Database

Choose whether to allow other Windows Users on the (same) computer shall be able to use the Database file.

Settings

In the **Description** box, enter a title for this copy of the database. This title will be displayed in the list of databases displayed when HandicapMaster is started.

In the **Icon** box, select an Icon to be displayed alongside the description.

Finish

Click **Finish** to create the Database file.

Cloud or SQL Server Database Configuration

If Cloud or SQL Server database has been selected, then on the **Cloud or SQL Server Database information** page, enter the details of the Database to be used, as provided by your Database Administrator.

- In the **SQL Catalog** box, enter the SQL server database catalog name. For example, this may be "MYSERVER\HANDICAPMASTER,1433".

- In the **SQL Database** box, enter the name of the SQL server database, as it is catalogued in SQL Server.

21.7.7 Choosing a copy of HandicapMaster to use

When more that one HandicapMaster database has been added through the Database Configuration utility, the "Choose a copy of HandicapMaster to run" window is displayed when HandicapMaster is first started.

To select the database you wish to use

Highlight the required database in the list and click **OK**.

To manage the list of Databases displayed

Use the Database Configuration utility to add to or modify the list of databases displayed when HandicapMaster starts.

21.8   Online Backup and Restore

21.8.1   Introduction

This section only applies where the HandicapMaster database is on-premises, and does NOT apply to cloud databases

The online backup and restore facility provides an extra level of protection to users of HandicapMaster.

This facility is a subscription based service which allows users to store HandicapMaster data in a secure off site location. The data stored may be used to restore a customer's data after a total loss of data.

To use this facility a valid subscription and working broadband internet connection is required.

If you have any queries regarding this online service please review the product information on HandicapMaster website here:

https://www.handicapmaster.org/products/onlinebackups.php

Subscription for the HM-SAFE online storage service.

An annual subscription fee is payable to us this service. This helps to cover costs of providing the service and providing support to customers.

For HandicapMaster Silver and Gold Editions customers who pay an annual renewal charge an extra item may be added to your invoice for this service.

For HandicapMaster Society edition users an online-payment facility may be used to pay for your subscription.

Current prices are available from the HandicapMaster website shop.

https://www.handicapmaster.org/shop

Where you may order online.

If you have any any further queries regarding this service please e-mail our support department

support@handicapmaster.org

Notes:

- Data is encrypted before being sent to the HM-SAFE online storage service.

- The HM-SAFE online storage service does not replace the need to take backups to local disks and removable media.

- While every effort is made to ensure the HM-SAFE online storage service is operational. HandicapMaster Limited cannot guarantee data that is posted to the HM-SAFE online storage service can be recovered in the event of loss following a technical problem with the service.

21.8.2   Online Backup

This section only applies where the HandicapMaster database is on-premises, and does NOT apply to cloud databases

To backup the database

1.   On the **File** menu, click **Backup Database**.

2.   Click the **Online Backup** button if you wish to perform an Online Backup for the first time.

3.   The first time you use this facility to must enter your HM-SAFE online storage service Identity Code as supplied when you registered for the service.

4.   Tick the **View Log** option to view a log. This may be useful if the backup is not successful.

5.   You may enter notes to be associated with the backup which may be useful for a future restore.

6.   Click **Yes** to perform the backup, or **No** to bypass the backup operation.

HandicapMaster will now send the encrypted data to the HM-SAFE online storage service, this can take from a few seconds to a few minutes depending on the size of your database and the speed of your internet connection

When the backup has been sent click the **Finish** button. If the **View Log** option was ticked then the log will be displayed.

Notes:

- Click the **Local Backup** button if you wish to perform a database Database Backup to local media.

- Data is encrypted before being sent to the HM-SAFE online storage service.

- When the data transfer is completed a check is made to ensure that the data was transmitted without errors. If there is a transmission error due to a communciations failure the backup will NOT be stored, and the backup must be sent again.

21.8.3   Online Restore

This section only applies where the HandicapMaster database is on-premises, and does NOT apply to cloud databases

To restore the database

1.   On the **File** menu, click **Restore Database**.

2.   Click the **Online Restore** button if you wish to perform an Online Restore for the first time.

3.   The first time you use this facility to must enter your HM-SAFE online storage service Identity Code as supplied when you registered for the service.

4.   Tick the **View Log** option to view a log. This may be useful if the restore is not successful.

5.   Click **Yes** to list the backups that may be restored, perform the backup, or **No** to bypass the restore operation.

Selecting the backup to restore

A list of available backups that may be restored is displayed with the most recent backup first. If you added any notes when a backup was taken these are displayed alongside the backup.

1. Select the backup to be restored by clicking on that entry in the list.

2. Click **Yes** to restore the backup, or **No** to bypass the restore operation.

Confirm the restore of the database

A progress bar is displayed showing the downloading of data from the HM-SAFE online storage service.

Once the download has completed you must confirm that you wish to restore the backup.

Click **Yes** to confirm that you wish to restore the backup.

A message will be displayed confirming the status of the restoration, click OK. If the **View Log** option was ticked then the log will be displayed.

Notes:

- Click the **Local Restore** button if you wish to perform a database Database Restore from local media.

- Your data is encrypted before being sent to the HM-SAFE online storage service.

Chapter

22

Data Protection - GDPR

22   Data Protection - GDPR

22.1   Introduction

This chapter covers the area of Data Protection and provides information about features in HandicapMaster. to assist organisations with Data protection and the General Data Protection Regulations (GDPR), namely

'REGULATION (EU) 2016/679 OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL of 27 April 2016'

This document is available from here (Note: External website and is an 88 page PDF document).

GDPR provides the following rights for individuals and their personal information.

- The right to be informed.

- The right of access.

- The right to rectification.

- The right to erasure.

- The right to restrict processing.

- The right to data portability.

- The right to object.

- Rights in relation to automated decision making and profiling.

This chapter also contains in *Contents below,* links to other areas of help related to managing data protection within HandicapMaster

Contents

- Policies and Contracts

- Master Scoreboard E-Mail Notification service

- Stop a Member's Name showing on Master Scoreboard (different chapter)

- Consent Settings preventing e-mails being sent

- Parental Consent

- Seeking confirmation of Personal data

- GDPR Personal Data Export Facility

- GDPR Data Erase

- GDPR Consent Status

- GDPR Audit Log

- GDPR Manage Member data transfer to WHS Platform

- Related Features and Good Practice

22.2   Policies and Contracts

We have published a number of documents about HandicapMaster Limited's approach to GDPR, many aspects of which we were already applying such as opt in to receive electronic communication from us.

With well over 1000 customers we have opted to provide our [Privacy Statement, Terms of Service and Contract details](#) on our website.

In this chapter, you will find additional GDPR related information.

See Also

- [Master Scoreboard E-Mail Notification service](#)

- [Stop a Member's Name showing on Master Scoreboard](#) (different chapter)

- [Consent Settings preventing e-mails being sent](#)

- [Seeking confirmation of Personal data](#)

- [GDPR Personal Data Export Facility](#)

- [GDPR Data Erase](#)

- [GDPR Audit Log](#)

- [Related Features and Good Practice](#)

22.3   Master Scoreboard E-mail Notification service

What is the Master Scoreboard E-mail Notification Service?

The service allows members to subscribe to notifications which can be sent:

-        When the club publishes to Master Scoreboard (from HandicapMaster)

-        When the member is booked into a competition, or a booking is cancelled (if Master Scoreboard is used for bookings)

 Club members may subscribe to the Master Scoreboard Email Notification Service provided that:

•   The club requires members to log on to Master Scoreboard using individual passwords

•   The club has enabled the Email Notification Service for its members

•   The member has set an individual password to log on to Master Scoreboard

Members may unsubscribe or suspend notifications at any time.

[Further details](#) can be found on the HandicapMaster website:

GDPR Implications of using the service?

Your organisation need to enable this service to make it available to members. By default it is NOT enabled.

This is an optional "opt in" service that your members may subscribe to. They do not need to subscribe.

If they have subscribed, then each e-mail that is sent to them offers them the option to unsubscribe.

In effect this is a "self-service" facility that the member can manage for themselves, and as such meets GDPR regulations.

See Also

- [Policies and Contracts](#)
- [Stop a Member's Name showing on Master Scoreboard](#) (different chapter)
- [Consent Settings preventing e-mails being sent](#)
- [Seeking confirmation of Personal data](#)
- [GDPR Personal Data Export Facility](#)
- [GDPR Data Erase](#)
- [GDPR Audit Log](#)
- [Related Features and Good Practice](#)

22.4 Consent Settings preventing e-mails being sent

To provide support for General Data Protection Regulation, GDPR we have added a setting to member records titled **Consent Given to receive Electronic communication**.

Clearly the member must have consented through your organisation's normal consent procedure (paper form when joining?), this new option in HandicapMaster allows you to note this and ensure that you comply with the regulations and only send e-mails from HandicapMaster to members who have consented to receive e-mails.

Amend Consent setting for an individual member

For an individual member do this:

1. Click **Edit Member** in the toolbar select the member in question and then select the **Contact Details** tab.

2. Tick or untick the **Consent Given to receive Electronic communication** box as required.

Amend Consent setting for an individual Visitor

For an individual visitor do this:

1. Do one of the following:

  - In the Visitors list, select a Visitor and press ENTER Key, or

  - In the Visitors list, select a Visitor, then on the **Players** menu, click **Edit Visitor**, or

  - On the Players menu, click **Edit Visitor** and select a Member from the list displayed.

2. Select the **Contact Details** tab.

3. Tick or untick the **Consent Given to receive Electronic communication** box as required.

Amend consent for multiple Members or Visitors

There is an option to select multiple members if required.

1. On the **Players** menu select **Data Protection** and then select **E-Mail Correspondence Opt-in**.

Members and visitors who are currently opted in will have a tick along side their name.

2. To remove consent remove the tick.

3. To record consent has been given add a tick alongside those members who have consented. Or use the **Select All** or **Clear All** buttons

4. Click **OK** to save the changes.

5. A summery of changes will be displayed

Note that you may re-sort the list by clicking on a column heading. You may also increase the size of the window.

See Also

- Policies and Contracts

- Master Scoreboard E-Mail Notification service

- [Stop a Member's Name showing on Master Scoreboard](#) (different chapter)

- [Seeking confirmation of Personal data](#)

- [GDPR Personal Data Export Facility](#)

- [GDPR Data Erase](#)

- [GDPR Audit Log](#)

- [Related Features and Good Practice](#)

- [Stop a Member's Name showing on Master Scoreboard](#) (different chapter)

22.5   Parental Consent

To provide support for General Data Protection Regulation, GDPR we have added a setting to member records titled **Parenl/Guardian Consent obtained (if required)**.

This allows organisations to record if parental consent was given if required for **Consent Given to receive Electronic communication**.

Amend Consent setting for an individual member

For an individual member do this:

1. Click **Edit Member** in the toolbar select the member in question and then select the **Contact Details** tab.

2. Tick or untick the **Parent/Guardian Consent obtained (if required)** box as required.

Amend Consent setting for an individual Visitor

For an individual visitor do this:

1.   Do one of the following:

- In the Visitors list, select a Visitor and press ENTER Key, or

- In the Visitors list, select a Visitor, then on the **Players** menu, click **Edit Visitor**, or

- On the Players menu, click **Edit Visitor** and select a Member from the list displayed.

2. Select the **Contact Details** tab.

3. Tick or untick the **Parent/Guardian Consent obtained (if required)** box as required.

Amend Parental consent for multiple Members or Visitors

There is an option to select multiple members if required.

1. On the **Players** menu select **Data Protection** and then select **Parental Consent Opt-in**.

Members and visitors who have Parental consent will have a tick along side their name.

2. To remove consent remove the tick. Or use the **Select All** or **Clear All** buttons

3. To record consent has been given add a tick alongside those members who have consented.

4. Click **OK** to save the changes.

5. A summery of changes will be displayed

Note that you may re-sort the list by clicking on a column heading. You may also increase the size of the window.

22.6   Seeking confirmation of Personal data

This section provides details about how to contact your members from HandicapMaster and to seek confirmation that the personal data you hold in HandicapMaster for those members is valid.

We suggest that you create a letter template using the letter writer inHandicapMaster.

A letter template can contain personal data such as address, phone numbers and e-mail addresses as well as other data.

You may then e-mail (or print) the letters.

There are further details about fields in the letter writer here.

Once you have created the letter you can then send this by e-mail or print if required.

When you e-mail the letter, it is included as an attachment with the individual personal data contained in the "fields" in the letter. So, each individual will only see their personal data.

If you seek consent in the letter to contact the member by e-mail going forward then you can adjust the consent for an individual.

Notes

- The member must have consented through your organisation's normal consent procedure (paper form when joining?), this new consent option in HandicapMaster allows you to note this and ensure that you comply with the regulations and only send e-mails from HandicapMaster to members who have consented to receive e-mails.

- Where HandicapMaster is linked to an external membership system the following approach is additionally implemented:

  - If HandicapMaster receives an e-mail address for a member from the membership system we will opt the member in to receiving e-mails through HandicapMaster In this case the external membership system is managing electronic communication opt in AND it will ONLY send an e-mail address for a member who has opted in to receive electronic communication.

  - If the member is subsequently opted out in the external membership system then the next membership update for that member sent to and received by HandicapMaster will NOT contain an e-mail address and the member will be in effect opted out.

See Also

- Policies and Contracts

- Master Scoreboard E-Mail Notification service

- Stop a Member's Name showing on Master Scoreboard (different chapter)

- Consent Settings preventing e-mails being sent

- GDPR Personal Data Export Facility

- GDPR Data Erase

- GDPR Audit Log

- Related Features and Good Practice

22.7 GDPR Personal Data Export Facility

One of the new rights under GDPR is "The right to data portability".

HandicapMaster provides a Personal Data Export facility (to meet this new right under GDPR).

1. On the **Players** menu select **Data Protection**.

2. Select **Personal Data Export**.

3. Select the member who has requested their personal data.

4. Click **OK**.

5. Choose a location and file name to save the data to.

6. When the data is exported you will be prompted to "View" the file.

NOTES:

- The data is exported to a CSV (Comma Separated Variable) file format.

- Each time an export of personal data it performed, an audit entry will be recorded in the GDPR Audit Log in HandicapMaster

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See Also

- Policies and Contracts

- Master Scoreboard E-Mail Notification service

- Stop a Member's Name showing on Master Scoreboard (different chapter)

- Consent Settings preventing e-mails being sent

- Seeking confirmation of Personal data

- GDPR Data Erase

- GDPR Audit Log

- Related Features and Good Practice

22.8   GDPR Data Erase

GDPR erase facility. This option allows the erasure of a past member or past visitor's PERSONAL INFORMATION to meet the General Data Protection Regulation (GDPR). This facility will remove personal data, but not collective data such as historic competition results.

Typical use of this facility would be when:

1.   A past member or past visitor requests a GDPR data erase

2.   As part of your organisation's data retention policy you periodically erase personal data.

This data erasure clearly cannot be applied to a current member as to do so would lead to a number of issues. For example, it would mean that the club would have no contact details, such as may be required in the event of an accident while at the club etc.

In effect you cannot be both a member and also not provide the club with sufficient personal data to maintain membership!

This facility will permanently remove ALL membership details about a past member or visitor except for:

Name, Home club, age group and gender.

In addition the name will be displayed as "withheld" on Master Scoreboard.

Erase Personal Data

To erase personal data:

1. Click **File** drop-down menu then select **Housekeeping**.

2. Click **Next** and select **GDPR Data Erasure**. Click **Next**.

3. Click **Select Players to have personal Data Erased**.

4. Tick the box alongside the players who require personal data to be erased, then proceed through the wizard.

Notes

- Although you may have erased data from HandicapMaster.you may need to consider if data may existing in previous backups of the HandicapMaster.database where your organisation manages backups.

See Also

- Policies and Contracts

- Master Scoreboard E-Mail Notification service

- Stop a Member's Name showing on Master Scoreboard (different chapter)

- Consent Settings preventing e-mails being sent

- Seeking confirmation of Personal data

- GDPR Personal Data Export Facility

- GDPR Audit Log

- [Related Features and Good Practice](#)

22.9   GDPR Consent Status

To provide support for General Data Protection Regulation, GDPR we have added two settings to member and visitor records titled:

- Consent Given to receive Electronic communication

- Parent/Guardian Consent obtained (if required)

View Status for a single member

For an individual member do this:

1. Click **Edit Member** in the toolbar select the member in question and then select the **Contact Details** tab.

2. Tick or untick the **Consent Given to receive Electronic communication** box as required.

View Status for a single visitor

For an individual visitor do this:

1.   Do one of the following:

   - In the Visitors list, select a Visitor and press ENTER Key, or

   - In the Visitors list, select a Visitor, then on the **Players** menu, click **Edit Visitor**, or

   - On the Players menu, click **Edit Visitor** and select a Member from the list displayed.

2. Select the **Contact Details** tab.

View Status for all members or Visitors

To view the GDPR consent status one or more members or visitors

1.   Do one of the following:

   - On the **Reporting** menu, select **Membership Reports** and select **GDPR Consent Status**

   - On the Task/Explorer tab, click **Tasks** and then in the **Places** list in the left-hand column, click **Reports**

   - Select the **Membership** tab on the right hand side

   - Double click on **GDPR Consent Status**

2. Select if members or visitors are to be included in the report and click OK

22.10 GDPR Audit Log

An audit log containing details of GDPR activity is available as a report.

This includes details of when data has been exported, consent status changed, and personal data erased.

To view the Audit Log

- On the **Reports** drop-down menu select **Membership Reports**.

- Select either

    - **GDPR Audit Log (Alphabetical order)** or

    - **GDPR Audit Log (Date order)**

- Select the reporting criteria and click **OK**.

See Also

- Policies and Contracts

- Master Scoreboard E-Mail Notification service

- Stop a Member's Name showing on Master Scoreboard (different chapter)

- Consent Settings preventing e-mails being sent

- Seeking confirmation of Personal data

- GDPR Personal Data Export Facility

- GDPR Data Erase

- Related Features and Good Practice

22.11 GDPR Manage Member data transfer to WHS Platform

May not be available in all regions due to regulatory restrictions.

Some National World Handicap System platforms require the transfer of personal member data. The exact details of the data transferred can be provided by your National Golf authority.

Tournament Editions do not have this option as they do not manage club membership.

To assist clubs to meet their data protection obligation, the following facilities are available.

Opt all members in to data transfer

Where a club only has members in HandicapMaster who have handicaps, and are affiliated members of your National Golf Authority then this option allows you to indicate that all members have consented (by your organisation's appropriate procedure) to the transfer of their data to the World Handicap System Platform.

1. On the **Players** menu select **Data Protection** and then select **Member Data Transfer to WHS Platform**.

2. Select **All Members have Opted-in** and click OK to save.

Selective Member Opt-in to data transfer

There is an option to select multiple members if required.

1. On the **Players** menu select **Data Protection** and then select**Member Data Transfer to WHS Platform**.

2. Members who are currently opted in to have data sent to the World Handicap System Platform will have a tick along side their name.

3. To remove consent remove the tick.

4. To record consent has been given add a tick alongside those members who have consented. Or use the **Select All** or **Clear All** buttons

5. Click **OK** to save the changes.

6. A summery of changes will be displayed

Note that you may re-sort the list by clicking on a column heading. You may also increase the size of the window.

Report of current member Opt-in Status

Where Selective Member Opt-in has been selected the **Report of Member Opt-in Status** button will be displayed and when you click this a report will be generated which can then be viewed.

Notes

Until at least one of the two options is selected you will not be able to publish to the World Handicap System Platform where the transfer of member data is required. (May not be available in all regions due to regulatory restrictions.)

The exact data being sent to the World Handicap System is defined by your National Golf authority.

22.12 Related Features and Good Practice

The following features and practices assist with data protection and control of access to information.

HandicapMaster User Accounts

User Accounts allow the HandicapMaster data to be password protected against unauthorised use,

Users may also be given custom properties so that they may only access data or operations which are relevant to their role.

- Enable the use of User Names and Passwords

- Add User Names and set the Custom Properties appropriately (including whether the User may view the personal data of players)

MasterScoreboard.co.uk Password Protection

All new MasterScoreboard.co.uk configurations are password-protected. Some existing clubs may have a 'No Password' option which is historic.

If your MasterScoreboard.co.uk pages do not require players to log in, this can be enabled using the Master Scoreboard Control Panel.

Protection can be a single password shared by all users (set using the Control Panel) or an individual password set by the user.

Chapter

23

Keeping HandicapMaster Software up to date

23   Keeping HandicapMaster Software up to date

23.1   Introduction

The HandicapMaster Update service is an online extension of HandicapMaster that helps you keep your HandicapMaster product up-to-date. Product updates are created by HandicapMaster to bring you the highest levels of stability. Updates are also issued when additional facilities are added to HandicapMaster. These may be the result of Customer feedback, or part of ongoing product development. Occasionally updates are also required to deal with changes to the handicapping rules.

Users with an Internet connection can check for program updates. If any are found, they can be downloaded and installed by HandicapMaster automatically.

Those running HandicapMaster on a computer with a broadband Internet connection (an 'always-on' connection) may like to configure HandicapMaster to automatically check for updates each time HandicapMaster is started.

Contents

- Check for Program Updates
- Automatically update software

23.2 Check for Program Updates

To run a check for Program Updates

1. On the **Help** menu, select **Check for Updates Online**.

2. If you wish HandicapMaster to check for available updates automatically each time HandicapMaster is started, tick the **Check each time HandicapMaster is started on this Computer** box.

3. Click **Check for Updates Now** button to check, download and install any program updates available.

Notes:

- This option requires an active Internet Connection.

- For support purposes, the licenced Organisation Name and Program Version number currently being used will be passed to the HandicapMaster web site when the check for updates is run.

- Access to the **Check each time HandicapMaster is started on this Computer** option may be restricted using Custom Access.

23.3 Automatically update HandicapMaster software

To configure HandicapMaster to automatically install program updates when available

1. On the **Help** menu, select **Check for Updates Online**

2. Tick the **Check each time HandicapMaster is started on this Computer** box.

Notes:

- This option requires that an Internet connection is available when HandicapMaster is started.

- Access to this option may be restricted using Custom Access

Chapter

24

Integrating HandicapMaster with Other Systems

24 Integrating HandicapMaster with Other Systems

24.1 Linking to Other Membership Systems

24.1.1 Introduction

HandicapMaster Gold includes two options to integrate membership information from an external system. When integrated, Membership information is kept in line with changes made in the external Membership system.

The two options allow membership information to be sourced from the external system by

- sharing information via a Comma-separated Values (CSV) file, or

- using the HandicapMaster 'Remote Requests' facility. For HandicapMaster to receive Remote Requests the external system MUST have been programmed to use the HandicapMaster database stored procedures for databases using SQL Server database technology. Please contact your software supplier to confirm this before you activate the Remote Request Integration facility.

- An older ActiveX DLL interface is available for the HandicapMaster 'Remote Requests' facility. Its use is deprecated.

When membership integration is configured, membership information becomes read-only in HandicapMaster

This chapter describes these Integration facilities and how they can be activated.

Contents

- How loading Membership information by CSV file works

- How loading Membership information by Remote Requests works

- Activating and Configuring the Integration Facility

- Report Account ID values in use

24.1.2 How loading Membership information by CSV file works

Matching of Membership Records

Records passed in the CSV load file are matched against records in HandicapMaster.

- Where there is a match, the membership details in HandicapMaster are refreshed with the data from the load file. If the player is currently listed in the Past Members list in HandicapMaster, they are returned to the active (all) members list.

- Where a record is found in the load file that cannot be matched in HandicapMaster, a new membership record is created in HandicapMaster.

- Where a record in HandicapMaster cannot be matched with a record in the load file, the player is marked as a 'Past Member' in HandicapMaster.

To match records between the file and HandicapMaster, an 'Account ID' is maintained in the database. This is the sole item used for the matching and it is **essential that a unique account id is maintained by the membership system for each player**.

Where members with the same name are included in the CSV Load file, HandicapMaster will ensure the names in HandicapMaster are unique. This is done by adding "(x)" to the surname where x is a numeric value starting at 2.

The names are not used for matching records between the file and HandicapMaster.

See Layout of the CSV File topic for an explanation of the membership fields that may be loaded from the external membership system.

HandicapMaster Start-up

When the CSV Load Facility has been activated (see below), HandicapMaster start-up is modified to search for a specific file on the PC or Network. If the file is found, a refresh of Membership details is undertaken.

When a file is located, it is only processed when it is recognised as having different content compared to the previous time it was processed.

Processing when File is located

Where a file is located, the following sequence of events is initiated:

1. An automatic backup of the HandicapMaster database file is taken (file duplicated to the "Backups" folder - Not applicable for 'Cloud' databases)

2. A temporary memory structure is created in the HandicapMaster database and records from the Load file are inserted into this memory structure.

3. Rows in the existing Membership Table are read and a search for a corresponding row in the temporary memory structure undertaken. If a match is found, applicable information from the temporary memory structure is used to update the Membership record. If no match is found, the Membership record is marked as a Past Member.

   Visitor rows are excluded from the search.

4. Rows in the temporary memory structure are read and a search for a corresponding row in membership Table undertaken. Where no match is found, a New Member record is added.

5. The temporary memory structure is deleted.

6. The Load File is renamed with "'.BAK" extension.

Reviewing the Audit File

An audit file is created each time the Load Facility runs. This file is named the same as the Load File itself, but with the addition of a ".LOG" extension. It is located in the same folder as the Load File.

The Audit file details new members added, members marked as Past Members, and duplicate names being encountered.

The Audit file is recreated each time the Load Facility runs.

Running the Load Facility manually

The Load Facility may be re-run at any time HandicapMaster is running by selecting menu item **Load Membership records…** listed under the **Players** menu.

24.1.3 Layout of the CSV File

Required format of the CSV File

The file must be a "Comma-Separated Values" file which is typically suffixed .CSV. This format can, for example, be saved from a spreadsheet in Microsoft Excel.

- The file must be an ASCII text file,

- There must be one membership record per record in the file,

- There must be no header line in the file,

- Each field within each record must be separated by a comma.

The fields supported are as follows:

Account ID or Contact ID
This is an identifier used by the external membership system to uniquely identify the member. This may be a numeric or text

First Name
Member's First Name

Surname
Member's Surname

Middle Initials
Member's Middle Initials

Title
The Title of the member, expressed as one of the recognised abbreviations accepted by HandicapMaster. These are "Mr", "Mrs", "Miss", "Master", "Ms", "Dr", "Sir", "Lady", "Lord", "Rt.Hon" or "H.R.H". Default: Mr, Master, Ms or Miss depending upon whether membership record is Male/Female and whether Junior.

Gender
The gender of the member expressed as 'M' for Male or 'F' for Female. Default: Male.

Date of Birth
Member's Date of Birth. This is used to set the Age Group of the member.

- If greater or equal to 18 years sets members age group to JUNIOR

- If greater than 18 but less than Senior age (default of 65) sets member's age group to ADULT.

- If equal or greater than Senior age (default of 65) sets member's age group to SENIOR

Category
The Membership category to which the member belongs to. Default: Category of "Unknown".

Card Number
The player's membership card number. This matches field 'Has Other Membership Card' in membership record.

Membership No (or Club Number)
The Membership number or code for this member. Default: No Membership Number or Code.

PIN No
Player's PIN number, used for keypad only competition score entry. Default: Lowest free 3 to 6 digit number. Note: if Visitor PIN's are enabled then the PIN for a Member must NOT be allocated a value in

the Visitor PIN range by the external membership system. If it is within the Visitor PIN range it then it will be allocated a random PIN number outside the Visitor PIN range.

National ID
The Member's National ID (England, Ireland, Scottish or Welsh national ID)

Address 1
The first line of the Member's address.

Address 2
The second line of the Member's address.

Address 3
The third line of the Member's address.

Address 4
The fourth line of the Member's address.

Address 5
Typically the Post Code of the Member's address.

Telephone 1
The Member's first telephone number.

Telephone 2
The Member's second telephone number.

Telephone 3
The Member's third telephone number

Locker No
The Member's Locker Number.

Email
The Member's E-mail Address.

Note:

- It is necessary for the Account ID, First Name and Surname fields to be included, as a minimum. The remainder of the fields are optional.

Including a Comma in the data to import

If the data to be imported in to HandicapMaster includes a comma itself, the field should be enclosed in double quotes. For example, to import an address field with a comma, the field should be entered as

"1 High Street,"

This is how Microsoft Excel will export any data containing a comma when a spreadsheet is saved in "Comma-separated Values" file format.

24.1.4 How loading Membership information by Remote Requests works

The Remote Request Membership loading interface implements an interface that can be used by an external membership system to manage members within HandicapMaster.

This interface requires the external membership system to be programmed to interface with stored database procedures for databases using SQL Server database technology. Technical details of integrating your application with this interface are beyond the scope of this document. Please contact

us for further information

This interface supports the following types of request

INSERT member
DELETE member
STATUS of request

The INSERT member request can either add a new member or update an existing member's details.

The DELETE member will place the member into the Past Members list.

The STATUS request allows the external membership system to determine if a previously queued request has been processed, and the results of that processing.

The interface allows individual changes to be made, instead of the CSV membership load where all records are "bulk" loaded.

Matching of Membership Records

The processing of requests is slightly different from the CSV load facility.

INSERT request received:

- Where there is a match with an existing record in HandicapMaster, the membership details in HandicapMaster are refreshed with the data from the request. If the player is currently listed in the Past Members list in HandicapMaster, they are returned to the active (all) members list.

- Where a request cannot be matched with existing records in HandicapMaster, a new membership record is created in HandicapMaster.

DELETE request received:

- Where there is a match with an existing record in HandicapMaster, the player is marked as a 'Past Member' in HandicapMaster.

To match records between the external membership system and HandicapMaster, an 'Account ID' is maintained in the database. This is the sole item used for the matching and it is **essential that a unique account id is maintained by the membership system for each player**.

HandicapMaster Start-up

When the Remote Request Load Facility has been activated (see below), HandicapMaster start-up is modified to periodically check for any requests that have been queued. These requests are queued by the membership system using the Remote Request interface. If a request is found in the queue a refresh of Membership details is undertaken in HandicapMaster .

Notes:

There can be a short delay between a request being queued by an external membership system and it being processed in HandicapMaster .

Any computer on the network running HandicapMaster may process any outstanding requests meaning that if a computer fails you just need to start HandicapMaster on another computer to ensure continued processing.

Reviewing the Audit File

An audit log file is updated each time a request is processed. This file is named "HMRRImport.log".

This is located in the folder:

> {AppDataDir}\HandicapMaster

where "{AppDataDir}" is by default C:\Users\{User Name}\AppData\Roaming

The Audit file details new members added, members marked as Past Members, and duplicate names being encountered.

The Audit file is appended to as each request is processed.

Once the file reaches a size of reaches a size of 512KBytes the original file is moved to a file with .old as the extension.

e.g. HMRRImport.log.old and a new "HMRRImport.log" file is created.

Running the Load Facility manually

The Load Facility may be re-run at any time HandicapMaster is running by selecting menu item **Load Membership records…** listed under the **Players** menu.

24.1.5 Activating and Configuring the Integration Facility

The Integration Facility can only be activated and maintained by the ADMIN user of HandicapMaster.

To access the integration facility

1. On the **File** menu, click **Options.**

2. Click the **Integration** tab**.**

3. Click the **Integration Configuration** button.

4. Choose the method of Integration.

   Depending on the current configuration any of the three options may be marked indicating the current active configuration. If the Remote Request load is activated then and additional option is displayed.

   ### No Membership Load

   This option will turn off all membership loading on this computer and any other computers running HandicapMaster if you are using a networked installation.

   ### CSV Loading

   The Load Memberships from CSV File window is displayed.

   ### Remote Request Loading

   If you select Remote Request loading then the following options may be displayed:

   - **Get Member updates using Callback**
     This option allows you to configure HandicapMaster to request membership records updates from external systems. Available interfaces are configured as Callback services, each service given it's own number. Only select this option if you are suing a chosen Callback service.When selected, click **Configure...** to set the required attributes of the interface to the external system. Button **Reload All Members** becomes available when this option is selected, allowing a full resynchronisation of member records to be undertaken

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when required.

- **Pause Membership loading**
  This option allows you to temporarily pause the loading of membership details. You can pause the loading on one computer and all other computers running HandicapMaster in the network will also pause loading.

- **Update Card Number**
  Allow the external system to update the Other Golf Membership Card Number value. The default is for this option to be selected. You would un-select this option where these card numbers are being entered manually into HandicapMaster .

- **Update WHS Platform Number**
  Allow the external system to update the Member's WHS Platform Number value. The default is for this option to be selected. You would un-select this option where these card numbers are being entered manually into HandicapMaster . NOTE Not available for England Golf Clubs.

- **Use numeric matching when initial match fails to locate member**
  This option can be used to attempt to match the requests from the membership system using a numeric match rather than the default text matching that is use to locate existing members. It is unlikely that this option will be required in most cases so it defaults to being off.

- **Recent Requests Log**
  Click this button to generate a report of the most recent Remote Request messages received by HandicapMaster. This may be of help to diagnose issues where member details are not updated.

Notes:

The Remote Requests Log file may need to be sent to your supplier's support department for analysis. This is done when HandicapMaster Diagnostics are sent.

24.1.6 Load Memberships from CSV File window

Click the **Browse** button to identify the location of the Load File.

Configuring the columns to be used from the CSV File

It is necessary to specific which columns are to be read from the Load File and to which membership items these relate. Three columns are mandatory:

- Account ID
  Critically must be the unique Account ID used to match records between the Load File and HandicapMaster database.

- First Name

- Surname

The remainder of the columns are optional. Tick an applicable box and enter the column number to activate processing for that item of data.

CSV load Options

If you click on the options tab then you may:

- **Choose to ignore some records**

  Some records in the Load File may, optionally, be skipped when processing the file. Use the **Ignore any Rows where Column … starts with characters …** option to specify any exclusion records.

- **Treat the Account ID field as Text**

  Some membership systems when they export data to a CSV file will generate the Account ID as text rather than as a number, tick this option if that is the case.

- **Pad Card Number field**

  Some membership systems when they export data to a CSV file will generate the Card Number as a number rather than as text. This can cause some card numbers to miss leading zero's. Use the **Pad Card Number with Leading Zero's to ... characters** option to ensure leading zero's are added if this is the case.

- **Truncate First Names to First Word only**

  Some membership systems when they export data to a CSV file will include more than one first name or initials in the 'First Name' field. To limit the first names loaded into HandicapMaster to the first word or initial only, tick the **Truncate First Names to First Word only** box. Any text passed after the first space, comma or full stop in the First Name field will be discarded.

- **Restrict whether a load occurs, by logged on UserID**

  It is possible to restrict whether a Membership File is loaded depending upon which user is currently logged into HandicapMaster.

  Click **Restrict Load by Users** button to configure the action to be performed when a Load file is found, by UserID. The Restrict Load of Records by Userids window is displayed:

  Select a UserID, then click

  - **Always** to require HandicapMaster to automatically perform the load when a file is found (the default),

  - **Prompt** to require HandicapMaster to prompt the User for whether a load should be performed, or

  - **Never** to always skip loading the file, when HandicapMaster is logged on by this Userid.

- **Copy current Membership Numbers as Account ID numbers**

  When setting up the integration, this option allows the Account ID's to be preset the same as the Membership Numbers for any existing Members.

24.1.7 Report Account ID values in use

In order to diagnose problems matching data between the Membership System and HandicapMaster there is a report that can be generated.

To create a report of Member records and their Account ID's

1. On the **File** menu, click **Options.**

2. Click the **Integration** tab**.**

3.   Click the **Report Current Account ID's** button.

A file called "AccountIDs.txt" listing the values currently in the HandicapMaster database (excluding "Past Members") is created.

The Account ID's are shown as they will be interpreted according to the current integration configuration. A message is displayed indicating the location of the output file.

24.2 Linking Competition Fees to External Accounting or Till Systems

24.2.1 Introduction

HandicapMaster Gold includes the option for competition fees to be deducted from External Accounting or Till (EPOS) systems as players sign in to competitions before commencing play or book into a future competition (booking in at the clubhouse only).

If the HandicapMaster Subscriptions Option is installed further details for fee deduction are available.

Description

When linked with an external Accounting or Till (EPOS) system it is possible to configure Player Entry to check a member's account balance, and prevent entry to the competition if the member has insufficient funds when signing-in or when booking in using Player Entry.

When a player either sign's in or books into to a competition using the HandicapMaster Player Entry screens, the member's account balance in the external system is accessed to check the account has sufficient funds to enter the competition. If the account has sufficient funds, then the player is signed in or booked in to the competition and the fee(s) deducted from their account.

Configuration of this facility is specific to the external Accounting or Till system. Please contact HandicapMaster Limited or your Accounting or Till (EPOS) system supplier for specific details.

Notes:

- The External fee deduction facility requires that the supplier of the external system has provided an interface to their system to HandicapMaster Limited. Please contact HandicapMaster Limited or your Accounting or Till (EPOS) system supplier to check if this is available.

- When use of the External fee deduction facility for sign-in is enabled an option is available to display the player's account balance if they are successfully signed in.

24.3   Linking to BRS, MyTeeTime, eTee Sheet or Tee Times 4 You Online Tee Booking Services

24.3.1   Introduction

HandicapMaster Gold include the option to integrate HandicapMaster with partner tee booking systems (BRS Online Tee Booking service, MyTeeTime Bookings, eTee Sheet or Tee Times 4 You bookings).

Where players are asked to book into competitions through one of these services, the player's names may be imported onto Start Sheets in HandicapMaster.

This chapter describes these Integration facilities and how they can be activated.

When configured for connection to the BRS system, HandicapMaster will enable names of members and their Membership Number (or Irish National ID) to be uploaded to the BRS service. Note only Irish national ID are supported by the interface.

When configured for connection to the MyTeeTime system, HandicapMaster will enable member details to be uploaded to the MyTeeTime service.

For information about the BRS Online Tee Booking service, please visit the www.brsgolf.com web site.

For information about the MyTeeTime service, please contact BedfordBeck Ltd.

For information about the eTee Sheet service, please visit the www.distinctsoftwaresolutions.com web site.

For information about the Tee Times 4 You service, please visit the www.teetimes4you.com web site.

Notes:

- Users must have a valid account with BRS Online, MyTeeTime, eTee Sheet or Tee Times 4 You to be able to use this facility.

- The BRS Online Tee Booking service is operated by **BRS Systems** and is not run by HandicapMaster Ltd.

- The MyTeeTime service is operated by **Bedfordbeck Ltd** and is not run by HandicapMaster Ltd.

- The eTee Sheet Service is operated by **Distinct Software Solutions** and is not run by HandicapMaster Ltd.

- The Tee Times 4 You service is operated by **J and S Software Developments** and is not run by HandicapMaster Ltd.

Contents

- Configure HandicapMaster to link with BRS Online
- Configure HandicapMaster to link with MyTeeTime
- Configure HandicapMaster to link with eTee Sheet
- Configure HandicapMaster to link with Tee Times 4 You
- Configure HandicapMaster to link with FlightLine
- Publish members' details to BRS Online
- Publish member's details to MyTeeTime

- Import Competition Bookings onto a Start Sheet

24.3.2 Configure link with BRS Online

To configure HandicapMaster to link with BRS Online

Note: You will need the Site Code, Folder, Username and Password, as supplied by BRS Golf, to configure HandicapMaster.

1. Start HandicapMaster and log in using the **ADMIN** user.

2. On the **File** menu, click **Options**.

3. Select the **Bookings** tab.

4. Tick **Bookings are received through** box and select **BRS Golf**

5. Enter the **Site Code**, **Folder**, **Username** and **Password**, given to you by your BRS account manager.

6. If you wish to be able to import competition bookings to a Start Sheet from BRS, tick **Competition Bookings may be imported onto Start Sheets from BRS Golf** box. See Import Competition Bookings onto a Start Sheet for further details.

7. If you wish to be able to upload Membership records to the booking service, tick **Membership updates may be uploaded to BRS Golf** box. Menu item **Publish to BRS Golf Tee Booking** will be added to the **Players** drop down menu the next time your start HandicapMaster.

8. Restart HandicapMaster.

The option **Publish to BRS Online Tee Booking** will become available on the **Players** Menu in HandicapMaster.

See Also

- Introduction
- Configure HandicapMaster to link with MyTeeTime
- Configure HandicapMaster to link with eTee Sheet
- Configure HandicapMaster to link with Tee Times 4 You
- Configure HandicapMaster to link with FlightLine
- Publish members' details to BRS Online
- Publish member's details to MyTeeTime
- Import Competition Bookings onto a Start Sheet

24.3.3 Configure link with MyTeeTime

To configure HandicapMaster to link with MyTeeTime

Note: You will need the Club Code reference, as supplied by BedfordBeck Ltd, to configure HandicapMaster.

1. Start HandicapMaster

2. On the **File** menu, click **Options**.

3. Select the **Bookings** tab.

4. Tick **Bookings are received through** box and select **MyTeeTime.**

5. Enter the **Club Code** given to you by your MyTeeTime account manager. This reference is your Club Code for your organisation on the MyTeeTime system.

6. If you wish to be able to import competition bookings to a Start Sheet from MyTeeTime, tick **Competition Bookings may be imported onto Start Sheets from MyTeeTime** box. See Import Competition Bookings onto a Start Sheet for further details.

7. If you wish to be able to upload Membership records to the booking service, tick **Membership updates may be uploaded to MyTeeTime** box. Menu item **Publish to MyTeeTime Tee Booking** will be added to the **Players** drop down menu the next time your start HandicapMaster.

See Also

- Introduction

- Configure HandicapMaster to link with BRS Online

- Configure HandicapMaster to link with eTee Sheet

- Configure HandicapMaster to link with Tee Times 4 You

- Configure HandicapMaster to link with FlightLine

- Publish members' details to BRS Online

- Publish member's details to MyTeeTime

- Import Competition Bookings onto a Start Sheet

24.3.4 Configure link with eTee Sheet

To configure HandicapMaster to link with eTee Sheet

Note: You will need the site reference, as supplied by eTee Sheet, to configure HandicapMaster.

1. Start HandicapMaster

2. On the **File** menu, click **Options**.

3. Select the **Bookings** tab.

4. Tick **Bookings are received through** box and select **eTee Sheet**

5. Enter the **eTee Sheet** site reference, given to you by your eTee Sheet account manager. This reference will be a numeric value for your organisation on the eTee Sheet system.

6. If you wish to be able to import competition bookings to a Start Sheet from eTee Sheet, tick **Competition Bookings may be imported onto Start Sheets from eTee Sheet** box. See Import Competition Bookings onto a Start Sheet for further details.

See Also

- Introduction

- Configure HandicapMaster to link with BRS Online

- Configure HandicapMaster to link with MyTeeTime

- Configure HandicapMaster to link with Tee Times 4 You

- Configure HandicapMaster to link with FlightLine

- Publish members' details to BRS Online

- Publish member's details to MyTeeTime

- Import Competition Bookings onto a Start Sheet

24.3.5 Configure link with Tee Times 4 You

To configure HandicapMaster to link with Tee Times 4 You

Note: You will need the site reference, as supplied by Tee Times 4 You, to configure HandicapMaster.

1. Start HandicapMaster

2. On the **File** menu, click **Options**.

3. Select the **Bookings** tab.

4. Tick **Bookings are received through** box and select **Tee Times 4 You**.

5. Enter the **Tee Times 4 You** site reference, given to you by your Tee Times 4 You account manager.

6. If you wish to be able to import competition bookings to a Start Sheet from Tee Times 4 You, tick **Competition Bookings may be imported onto Start Sheets from Tee Times 4 You** box. See Import Competition Bookings onto a Start Sheet for further details.

See Also

- Introduction

- Configure HandicapMaster to link with BRS Online

- Configure HandicapMaster to link with MyTeeTime

- Configure HandicapMaster to link with eTee Sheet

- Configure HandicapMaster to link with FlightLine

- Publish members' details to BRS Online

- Publish member's details to MyTeeTime

- Import Competition Bookings onto a Start Sheet

24.3.6 Configure link with FlightLine

To configure HandicapMaster to link with FlightLine

Note: You will need the site reference, as supplied by FlightLine, to configure HandicapMaster.

1. Start HandicapMaster

2. On the **File** menu, click **Options**.

3. Select the **Bookings** tab.

4. Tick **Bookings are received through** box and select **FlightLine**.

5. Enter the **FlightLine** site reference, given to you by your FlightLine account manager.

6. If you wish to be able to import competition bookings to a Start Sheet from FlightLine, tick **Competition Bookings may be imported onto Start Sheets from FlightLine** box. See Import Competition Bookings onto a Start Sheet for further details.

See Also

- Introduction

- Configure HandicapMaster to link with BRS Online

- Configure HandicapMaster to link with MyTeeTime

- Configure HandicapMaster to link with eTee Sheet

- Configure HandicapMaster to link with Tee Times 4 You

- Publish members' details to BRS Online

- Publish member's details to MyTeeTime

- Import Competition Bookings onto a Start Sheet

24.3.7 Publish members' details to BRS Online

To publish (or re-publish) the details of your members on the BRS Online Tee Booking service, names and Membership Numbers (or National IDs for clubs in Ireland) may be sent to BRS Online to be processed.

Within Ireland player National numbers will be published as the members' BRS Userids, Outside of Ireland values for Club Member Number in HandicapMaster will be published as the members' Userids on BRS. In the event that no member records in HandicapMaster have a numeric "Club Member Number", then members' HandicapMaster PIN numbers will be published instead.

To publish member names and numbers to BRS Online Tee Booking service

1.   On the **Players** menu, click **Publish to BRS Online Tee Booking**.

Notes:

This option will only be visible after the details of your account on the BRS Online service has been configured.

See Also

- Introduction

- Configure HandicapMaster to link with BRS Online

- Configure HandicapMaster to link with MyTeeTime

- Configure HandicapMaster to link with eTee Sheet

- [Configure HandicapMaster to link with Tee Times 4 You](#)

- [Configure HandicapMaster to link with FlightLine](#)

- [Publish member's details to MyTeeTime](#)

- [Import Competition Bookings onto a Start Sheet](#)

24.3.8 Publish member's details to MyTeeTime

To publish (or re-publish) the details of your members on the MyTeeTime Tee Booking service, names and membership details may be sent to MyTeeTime to be processed.

To publish member names and numbers to MyTeeTime booking service

1.   On the **Players** menu, click **Publish to MyTeeTime booking service**.

Notes:

This option will only be visible after the details of your account on the MyTeeTime service [has been configured](#).

See Also

- [Introduction](#)

- [Configure HandicapMaster to link with BRS Online](#)

- [Configure HandicapMaster to link with MyTeeTime](#)

- [Configure HandicapMaster to link with eTee Sheet](#)

- [Configure HandicapMaster to link with Tee Times 4 You](#)

- [Configure HandicapMaster to link with FlightLine](#)

- [Publish members' details to BRS Online](#)

- [Import Competition Bookings onto a Start Sheet](#)

24.3.9 Import Competition Bookings onto a Start Sheet

You may import bookings from a competition set-up on BRS booking, MyTeeTime, eTee Sheet or Tee Times 4 You onto a Start Sheet in HandicapMaster.

First, it is necessary to turn on this option in HandicapMaster.

Turn on the option to import bookings from the external booking system

1. See one of

- [Configure Link with BRS Online](#)

- [Configure link with MyTeeTime](#)

- [Configure link with eTee Sheet](#)

- [Configure link with Tee Times 4 You](#)

- Configure link with FlightLine

2. The next time you create a Start Sheet for a competition, you will be offered the option to import bookings from the Tee Booking system.

Import Bookings onto a Start Sheet

1. Do one of the following:

   - On the **Competitions** Menu, choose **Create a Start Sheet** and select the opened competition, or

   - In the **Opened Competitions** list, select the competition and click with the right-hand button. Click **Start Sheet**.

2. On the *Import Players from Bookings* page, select **Import Bookings from BRS Golf / MyTeeTime / eTee Sheet / Tee Times 4 You / FlightLine** option and click **Next**.

3. A list of competitions currently configured on the booking system will be displayed. Highlight the applicable competition and click **OK**.

4. The bookings will be imported onto the Start Sheet, where they can be matched to players in the HandicapMaster database.

At the end of the import, a list of players who have not been matched will be displayed, showing their Tee Time and any number associated to them on the booking system.

Note

- Where the booking for a slot is entered as "*", "X", "XX", "XXX" or starts with "XXXX" on the BRS system, the booking will be imported as an "Unavailable" slot in the Start Sheet.

How players are matched between BRS Golf, MyTeeTime, eTee Sheet or Tee Times 4 You and HandicapMaster

Where the Player's number on the booking system is recognised, the player will automatically be imported to the Start Sheet.

A number is checked for a match in the following order:

1. Player National ID

2. Club Member Number (*)

3. Other membership Card Number (*)

* For a match against Club Member Number or Card Number to be recognised, the player's Last name on the booking system must match the start of the player's Surname in HandicapMaster.

Where the Player's number is not recognised, or the player's name was typed in in freeform text on the booking system, HandicapMaster will advise that a match has not been located and offer the option to choose a matching player from a list of players and visitors in HandicapMaster.
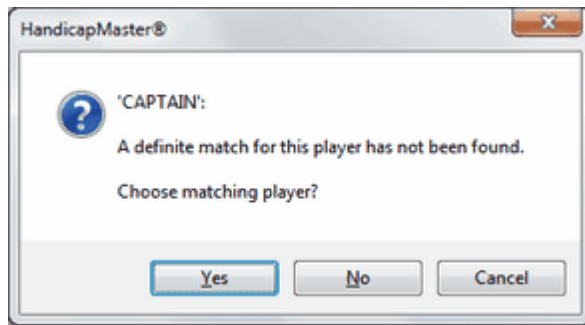
Answer **Yes** to choose a matching player from a list.

Answer **No** to ignore this player (not importing this player to the Start Sheet).

Answer **Cancel** to ignore this player and any subsequent players not matched in HandicapMaster during this import.

See Also

- [Introduction](#)
- [Configure HandicapMaster to link with BRS Online](#)
- [Configure HandicapMaster to link with MyTeeTime](#)
- [Configure HandicapMaster to link with eTee Sheet](#)
- [Configure HandicapMaster to link with Tee Times 4 You](#)
- [Configure HandicapMaster to link with FlightLine](#)
- [Publish members' details to BRS Online](#)
- [Publish member's details to MyTeeTime](#)

24.4   Exporting Start Sheet times and Scores to Golfdirecto

24.4.1   Exporting to Golfdirecto

Customers in Spain who are using the Golfdirecto system to send scores to the Royal Spanish Golf Federation for WHS handicapping purposes may choose to export times from a Start Sheet and scores from closed competitions in HandicapMaster to the Golfdirecto system.

When exported, HandicapMaster creates an export file ("CSV" format) which can then be imported into Golfdirecto.

Times and Scores are exported where the player ID's allocated by the Royal Spanish Golf Federation for WHS handicapping have been entered into HandicapMaster as player's "National ID".

To turn on the facility to export to Golfdirecto

Before the facility is made available in the system, the option to use this facility needs to be activated.

1. On the **File** menu, click **Options**

2. Tick the **Enable export of scores to Spanish Golfdirecto service** box.

To record player's Royal Spanish Golf Federation IDs in HandicapMaster

Scores will only be exported for players where their Royal Spanish Golf Federation ID's have been recorded in HandicapMaster.

Where the player is recorded as a member:

1.   Do one of the following:

   • In the Players list, select a Member and press ENTER Key, or

   • In the Players list, select a Member, then on the **Players** menu, click **Edit Member**, or

   • On the **Players** menu, click **Edit Member** and select a Member from the list displayed.

2.   Enter the player's Royal Spanish Golf Federation ID in the **National ID** box.

Where the player is recorded as a Visitor:

1.   Do one of the following:

   • In the Visitors list, select a Visitor and press ENTER Key, or

   • In the Visitors list, select a Visitor, then on the **Players** menu, click **Edit Visitor**, or

   • On the Players menu, click **Edit Visitor** and select a player from the list displayed.

2.   Tick the **Has National ID** box and enter the ID in the **National ID** box.

To export a player's list and tee times from a Start Sheet

1. After creating a Start Sheet with the competition players listed and tee times allocated to the players, view the Start Sheets report.

2. On the Start Sheets report options form, tick **Save Start Sheet details to CSV file** box.

3. Select the name and location of the file to be created.

4. Follow your Golfdirecto procedures to import the file created.

To export the scores from a competition

1. After closing the competition ('Apply Scores'), locate the competition in the closed competitions list, right click and select **Analyse Scores Entered** (or click the **Analyse Scores Entered** task in the left-hand column).

2. In the left-hand column, click the **Export scores to Golfdirecto** task.

3. Open a file to receive the exported scores.

4. Follow your Golfdirecto procedures to import the scores using the file created.

Chapter

25

Menu Options and Toolbar Buttons

25 Menu Options and Toolbar Buttons

25.1 Introduction

A quick guide to the Menu Options and Toolbar Buttons available.

The following section is intended as a quick summary list of the Menu Options available within HandicapMaster. Also identified are Toolbar Buttons where these have been provided.

Not all menu items will shown, depending on the HandicapMaster edition, licenced options and the services available.

Contents

- Table of options and toolbar buttons

25.2 Menu Options and Toolbar Buttons

The following is a quick guide to the Menu options available in HandicapMaster.

File Menu

Change Password
Change the System Password

Users
Add, amend or delete Userids in HandicapMaster

User Activity
View User activity in HandicapMaster

Options
Set system-wide parameters

Housekeeping
Perform 'Housekeeping' of database, such as removing data older than a chosen date

Print Report
Prints the currently-displayed report

E-mail
Send an e-mail to one or more recipients

Publish to Internet
Upload Competition and handicapping data to the MasterScoreboard.co.uk web site.
Connect to National Handicapping Service and deliver or receive Handicap records (if applicable)

Backup Database *(only available when database is on-premises)*
Produce a security copy of the HandicapMaster database

Restore Database *(only available when database is on-premises)*
Recover the HandicapMaster database from a previous security copy

Switch Database
Switch to another HandicapMaster database where customer has more than one database

Exit
Exit HandicapMaster (perform database backup if required)

Players Menu

New Member
Add a new member to the membership list.

Edit Member
Edit a members' membership record

Delete Member
Delete (remove) a member from the membership list.

New Visitor
Add a new Visitor (non-member) to the database.

Edit Visitor
Edit a Visitor's record

Delete Visitor
Delete (remove) a Visitor from the Visitor list.

Data Protection
Data protection related facilities

E-mail Correspondence Opt In
Manage members that have have opted in or out of receiving e-mail communications.

Parental Consent Opt In
Manage members where Parental Consent is required.

Personal Data Export
Write out personal data to an external file in CSV format for a single member to meet General Data Protection Regulation (GDPR) "Right of data portability".

Undelete (Undelete Visitor when integrated with external membership system**)**
Recover a previously deleted Member or Visitor

Letters
Enable a database of letters to be generated for easy addressing to members.

Letter Of Introduction
Write a letter of introduction for a member.

Load Membership Records (when integrated with external membership system)
Process membership data from external membership system

Import (Import Visitors when integrated with external membership system**)**
Import Membership (or visitor) records from an external file

Export
Write out Membership records to an external file in CSV format

Golf Courses
Add and amend Golf Club and course details

Course Scorecards
View courses and course scorecards available in HandicapMaster

Add a Course Scorecard
Define a new course scorecard

Add a Club/Organisation
Define a new club or organisation

Edit Club/Organisation

Amend a club or organisation

Golf Club Contact Details
Update email address, etc., for a club organisation

Officer Titles
Change the text of a Committee Officer title

Membership Categories
Change the text of a Membership Category.

Subscriptions (Not available when the Subscriptions Option has been installed as a licenced option)
Change the text of Subscriptions and also reset payments made.

Distribution Lists
Manage Distribution Lists to assist with communication by Letter or E-mail.

Accounting Menu (Only available when the Subscriptions Option has been installed as a licenced option)

Subscriptions
Manage membership subscriptions menu

The following subscription items are available:-
- Raise Subscriptions...
- Overdue Subscriptions...
- Reprint Subscriptions...
- Address labels
- View
- Amend Note
- Print
- E-mail
- Refund
- Void
- Void Multiple Subscriptions by range
- Void Multiple Subscriptions from list
- Cancel
- Set up a Template...
- Edit Template...
- Copy Template...
- Delete Template...
- Assign Template to Members...

Invoices
Manage invoices menu

The following invoice items are available:-
- Raise Invoices...
- Reprint Invoices
- View
- Amend Note

- Print
- E-mail
- Refund
- Void
- Void Multiple Invoices by range
- Void Multiple Invoices from list
- Cancel
- Mark as Bad Debt
- Set up a Template...
- Edit Template...
- Copy Template...
- Delete Template

Payments Received
Record payments received

Payments
Manage payments menu

The following payment items are available:-
- Member Statement
- Transaction History...
- View
- Amend Note
- Print Receipt
- Print a Range of Receipts
- E-mail Receipt
- Refund Payment
- Void
- Void Multiple Payments

Purses
Mange Purses menu

The following Purse menu items are available:-
- Members Purses
- Adjust Purse Balance...
- Refund Competition Purse Transaction
- Print Competition Purse Receipt
- E-Mail Competition Purse Receipt
- Recalculate Competition Purse Balances

Export
Export accounting records

Direct Debit
Manage Direct Debits

The following Direct Debit items are available:-

- Extract
- Manage Payments Received

Member Subscription Pools

Manage Subscription Pools.

The following Subscription pool items are available:-
- New Pool
- Edit Pool
- Delete Pool
- Manage Pool Members

Configure
Configure Accounting

The following configuration items are available:-
- Add New payment Item
- Edit payment Item
- Delete Payment Item
- Payment Categories
- Methods of Payment
- Direct Debit
- Competition Purse
- Start Date of Accounting Year
- E-mail Accounts Correspondence Opt In

Options
Manage Accounting settings.

Competitions Menu

Set Up A Template...
Set up the format of a Competition

Set Up A Bookings Template... (Gold editions)
Set up the format of a template for future bookings

Open a New Competition...
Start a new competition

View Opened Competitions
Display list of opened competitions

Bookings...
View or Configure Bookings for future competitions.

Start Sheets...
Produce a Start Sheet for a competition.

Enter Scores...
Enter scores returned in a competition (player by player).

Analyse Scores Entered...
View and edit scores already entered for a competition. May be displayed for either

- Opened Competitions

- Closed Competitions

Apply Scores...
Process a set of scores (compute competition results, change handicaps, etc.).

View Results...

View the results from a competition.

Match play Knock-outs
Manage match-play knockout draws including entering competitors into a match-play knockout draw (singles or pairs) and produce a random draw. Also process results in match-play competitions and produce updated knockout draw.

'Best-of' Series
Manage Best-of Series competitions.

Eclectic
Manage Eclectics

Suspend Player from Competitions... (Gold editions only)
Facility to suspend a player from competitions

Manage Competition Fees... (Gold editions only)
Manage the collection and processing of competition entry fees.

Undo
Reverse out the most recent competition processed (or general play / first award change). If competition, scores are returned to the state prior to 'Apply Scores'

Player Entry...
Configure the way Score Entry screens operate

The following configuration items are available:-

Configure Player Entry...
Configure the way Score Entry screens operate, including which equipment is used

Administration Button Password...
Set, update or remove a password protecting exit from the Player Entry screens.

Player Entry Message ... (Gold editions only)
Configure one or more messages to be displayed on the Player Entry screen in idle time between competitions

Run Player Entry Program...
Run the Player Entry screens on this computer.

Handicapping Menu

Allocate an Initial Handicap
Set an initial value for a player's Handicap.

Playing Note
Add a note to a player's Playing Record.

Record Initial Handicap Card(s)
Enter initial scorecards for a player who does not yet have a Handicap.

Record General Play Score
Enter a social (non-competition) score

Record Away Score
Record 'Away' scores (e.g. scores returned from another club).

Record Penalty Scores
Enter a penalty score

Adjust Handicap
Alter a player's Handicap

Freeze Handicap
Apply or remove a restriction on automatic changes to a player's Handicap.

Withdraw/Reinstate Handicap
Suspend or resume use of a player's Handicap.

Configure Handicapping Rules
Configure/view how handicaps will be adjusted.

Reports Menu

Player Record
Display a Player's Playing and Handicap Record. May be displayed in either

- Tabular format

- Tabular format (Visitors)

- Report format (suitable for printing)

- Graphical format

Handicap List
Create a current Handicap List report

Handicap List (Selected Range of Handicaps)
Create a current Handicap List report, limiting the players listed to only those with a Handicap between a chosen handicap range

Handicap List (Previous Date)
Create a Handicap List report showing Handicap values at a previous date

Handicap Certificate
Create a Handicap Certificate for a player.

Membership Reports
The following reports are available:-

- Membership Summary

- Membership Changes

- Membership Contact Summary

- Officer Contact Summary

- Names and addresses

- Telephone Numbers

- E-mail Addresses

- Membership Category (Alphabetical order)

- Membership Category (Category order)

- PIN Numbers (Alphabetical order)

- PIN Numbers (Numerical order)

- PIN Numbers (Shared)

- National ID's, Membership Card and PIN Numbers

- Locker Numbers

- Notes

- User-defined Notes

- Joining Dates & Category

- Anniversary of Joining & Category

- Renewal Dates

- Expiry Dates

- Age (Alphabetical order)

- Age (Date of Birth order)

- Other Club Membership

- Names Hidden on Master Scoreboard

- Subscription Paid Dates

- Subscription Amounts Paid (Not available with the Subscriptions Option, see Accounting Reports below for subscription related reports)

- Away Members

- Visitors

- Distribution Lists

- E-mail Log

- E-mail Summary Log

- E-mail Rejections Log *(only if using HandicapMaster e-mail service)*

- Membership Update Problems (when integrated with external membership system and using Remote Request)

- GDPR Consent Status

- GDPR Audit log (Alphabetical order)

- GDPR Audit log (Date order)

Competition Reports
The following reports are available:-

- View Competition Results

- Analysis of Scores Entered (Opened competition)

- Analysis of Scores Entered (Closed competition)

- Closed Competitions

- Scorecards from a Competition

- 'No Score Recorded' Scores

- Best Scores Analysis

- Competition Scoring Analysis

- Competition Prize Winners

- Countback Scores

- Players suspended from Competitions (Gold only)

- Player Hole-by-Hole Analysis

- Handicap adjustments at Score Entry

- Callback Log (when integrated with external membership system) or using a competition purse

- Order of Merit

- Number of 'Good' Holes Played

Bookings Reports (Gold only)
The following reports are available:-

- Competition Bookings

- History of Bookings (Opened competition)

- History of Bookings

- Online Payments Received (Opened competition)

- Online Payments Received

- General Bookings Schedule

- General Bookings Schedule (Date Range)

- Group Bookings - Confirmation of Reservation

- Forthcoming Group Bookings (Summary)

- Forthcoming Group Bookings (Detailed)

- Catering

- Fixture List

- Calendar Note

- Bookings by Member(s)

- Payments Received (when taking payments online through Stripe)

- Payments Summary (Monthly) (when taking payments online through Stripe)

Handicapping Reports
The following reports are available:-

- Handicap List

- Handicap List (Selected range of Handicaps)

- Handicap List (Previous Date)

- Handicap Certificates

- Handicap Freezes

- Tee Handicap Chart

- Strokes Received List (for a competition)

- Strokes Received Chart (for a singles competition)

  - Players without Handicaps

  - Playing Record

  - Playing Record (Visitors)

  - Playing Records (Selected Range of Handicaps)

  - Handicap Changes

  - Position-based Handicap Adjustments

  - General Play Scores (Summary)

  - General Play Scores (Recorded)

  - Away Scores (Recorded)

  - Number of Scores Returned

  - Lowest Handicap Held

  - Lowest Handicap Held (Selected Range of Handicaps)

  - Handicap Range

  - Summary of Scores

  - Most Improved Golfer

  - Handicap Record Archive

  - Playing Notes

  Accounting Reports (Only available when the Subscriptions Option has been installed as a licenced option)
  The following reports are available:-

  - Income Received

  - Member Purse Account Statement

  - Member Purse Transaction History

  - Purse Balances (Summary)

  - Purse Balances (Summary) - With Limit

  - Member Account Notes

  - Members Without a Subscription Template

  - Member Subscription Pools

- Member Subscription Pools And Members

- Payments (Summary)

- Payments (Summary, by Method of Payment)

- Payments (Full Details)

- Payments (by Member)

- Payments (Default Method of Payments)

- Subscriptions (Summary)

- Subscriptions (Summary of Overdue)

- Subscriptions (Valid)

- Subscriptions (Overdue)

- Subscriptions (Full Details)

- Subscription Purse Account Statement (Summary)

- Subscriptions Assigned to Letters

  - Competition Purse Income Received

  - Competition Purse Transactions

  - Competition Purse Account Statement (Summary)

  - Competition Purse Account Statements

  - Competition Purse Account Statements - With Limit

  - Competition Purse Historic Balance for Members

  - Competition Purse Historic Balance for Past Members

  - Competition Purse Prizes (Summary)

  - Competition Purse Prizes (Detailed)

  - Invoices (Overdue)

  - Direct Debit Details

  - Audit Log

  Configure layout of Handicap List
  Define the look and content of the Handicap List report.

  Layout and Options
  Define your own fonts and report attributes

View Menu

First Page
When displaying a report, move to first page of report.

Previous Page
When displaying a report, move to previous page of report.

Next Page

When displaying a report, move to next page of report.

Last Page
When displaying a report, move to last page of report.

Open/Close Task & Explorer Pane
Open or Close (Show or Hide) the Task and Explorer Pane.

Help Menu

HandicapMaster Help
Open this help document.

Welcome
Display Welcome screen.

Data Protection (GDPR)
Access help topics relating to data protection and the management of personal information.

HandicapMaster on the Web
Display HandicapMaster website in a browser.

Master Scoreboard on the Web
Display MasterScoreboard.co.uk website in a browser.

Master Scoreboard (Control Panel)
Display MasterScoreboard.co.uk Control Panel in a browser.

Check for Updates Online...
Keeps HandicapMaster software up to date by downloading and installing the latest program updates.

Send Diagnostic Files to Support
Sends information about this copy of HandicapMaster to HandicapMaster Support staff

Send Database Backup to Support *(Only available if database is on-premises*
Sends an encrypted backup of your HandicapMaster database to HandicapMaster Support staff

Remote Session to your PC from Support
 If you are talking to HandicapMaster Support Staff you may be requested to use this option to initiate a remote access session to your computer. HandicapMaster Limited CANNOT connect without you initiating the process. You remain in control and can disconnect at any time.

About HandicapMaster
Displays version information and option to **View Product Changes**

Chapter

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Appendix

26 Appendix

26.1 Send Diagnostic Files to Support

The "Send Diagnostic Files to Support" option allows data regarding your copy of HandicapMaster to be sent to HandicapMaster Limited Support staff for analysis.

The information will be sent by e-mail to "Support@HandicapMaster.org". The data is encrypted before being sent.

When to use this option?

Please only use this option when requested to by HandicapMaster Support.

Sending Diagnostic Files from another PC

You may specify which PC sends the diagnostic files (default: this PC). This allows the log files to be sent from a Player Entry PC which is located elsewhere in the club (e.g.a locker room), without having to visit the PC. It is not necessary to stop Player Entry to send the information.

To send the diagnostic logs from another PC, select the name of the PC from which the logs are to be sent.

Provided that the Player Entry system is running on the designated PC, the diagnostic files will be sent within a few minutes.

Note: If you have different user accounts, you require System Utilities – Update permissions to be able to request diagnostic files from another PC. No special permissions are required to send diagnostic files from the local PC.

What information is sent to HandicapMaster Support?

The information sent consists of the following files or data (when available on the PC):

- **ActivityLog.csv**
  This file contains an summary of recent activity in the database.

- **CallBack.log**
  Created when HandicapMaster is integrated with an external membership system and customised processing is implemented or where competition Purse fee deduction is enabled. Most HandicapMaster installations will not have this log or it will be blank.

- **CDH.Log**
  This file contains data sent and received from the National Handicap Platform for the most recent run of the **Publish to Internet** wizard, where manual publishing to the National Handicap Platform is available.

- **CDH_Timings.csv**
  This file contains the times for the most recent publishing to the National Handicap Platform.

- **CDH_Scores_Log.csv**
  This file contains recent score data sent to the National Handicap Platform.

- **Computers.csv**
  This file contains a summary of computers that have recently run HandicapMaster and connected to the database and the version of software they have run.

- **Connect.Log**
  This file contains details of the connection to MasterScoreboard.co.uk and/or the National Handicap Platform, for the most recent run of the **Publish to Internet** wizard.

- **DBConfig.xml**
  This file contains HandicapMaster Database configuration information.

- **EmailLog.csv**
  This file contains an summary of recent e-mail activity within HandicapMaster and any errors reported at the time of sending the e-mails.

- **EmailSettings.csv**
  This file contains an summary of e-mail connection settings data within HandicapMaster. Authentication credentials are not included.

- **Error.Log**
  This file contains details of all Unexpected Errors encountered by HandicapMaster, including those that cause HandicapMaster to end prematurely.

- **HandicapMaster.ini**
  This file contains HandicapMaster configuration information.

- **HandicapMasterUpdater.log**
  This file contains details of online software updates that have been applied and any errors encountered running the online update process.

- **HMRRImport.log**
  Created when HandicapMaster is integrated with an external membership system and contains a summary of membership requests received.

- **LocksTable.csv**
  This file contains an summary of any current database table locks.

- **MemberSummary.csv**
  This file contains a list of names, membership numbers of members, status of membership e.g. resigned, current etc. Player Entry PIN numbers (where used). National Handicap Platform id numbers (if applicable). No other personal details are sent.

- **NetworkPerformance.log**
  This file contains timings related to network and database traffic for cloud databases. No traffic details other than timings are logged.

- **RemoteRequestLog.log**
  Created when HandicapMaster is integrated with an external membership system and contains a details of membership requests received whre the Remote Request membership integration interface is in use.

- **ScoresEntered.txt**
  This file contains details of actions taken at the Player Entry screens using this Computer, over the preceding 90 days.

Where can these files be found?

These files can be located in the following folder:

Windows Windows 7, Windows 8, Windows 10 and Windows 11 Users:

- C:\Users\<User>\AppData\Roaming\HandicapMaster

- C:\Users\<User>\AppData\Roaming\HandicapMaster\National Data

where <User> is the name of the Userid used to Log into Windows. Please note AppData is a "hidden" folder in Windows.

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