# HandicapMaster Software

## CSV Membership Load facility

This file provides advice to Users who need to configure the CSV Membership Load facility

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# Contents

# Introduction

HandicapMaster Premier and Network Editions include two options to source membership information from an external system.

Load membership information from an external CSV file.

Load membership using a programme interface known as Remote Request *

*For this interface to operate the external system MUST have been programmed to use this interface. Please contact your software supplier to confirm this before you activate the Remote Request membership load.*

When configured in either of these ways, membership information becomes read-only in HandicapMaster.

This document describes the Load CSV facility and how it may be activated. Separate documentation is available for the Remote Request Load facility.

# How the CSV Load facility works

### Matching of Membership Records

Records passed in the 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.

### 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.

## 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. (

Note: 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.

## 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.

The Audit file details new members added, members marked as Past Members, and duplicate names being encountered.

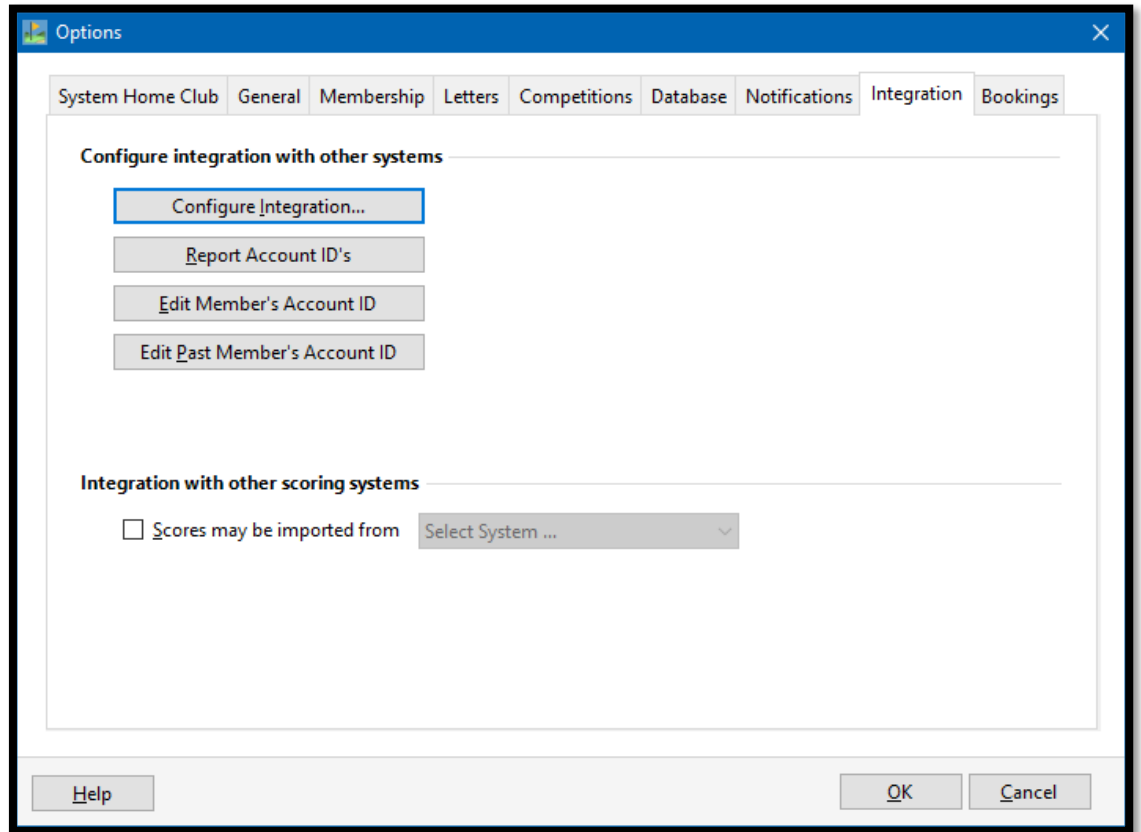The Audit file is recreated each time the Load Facility runs.

## 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.
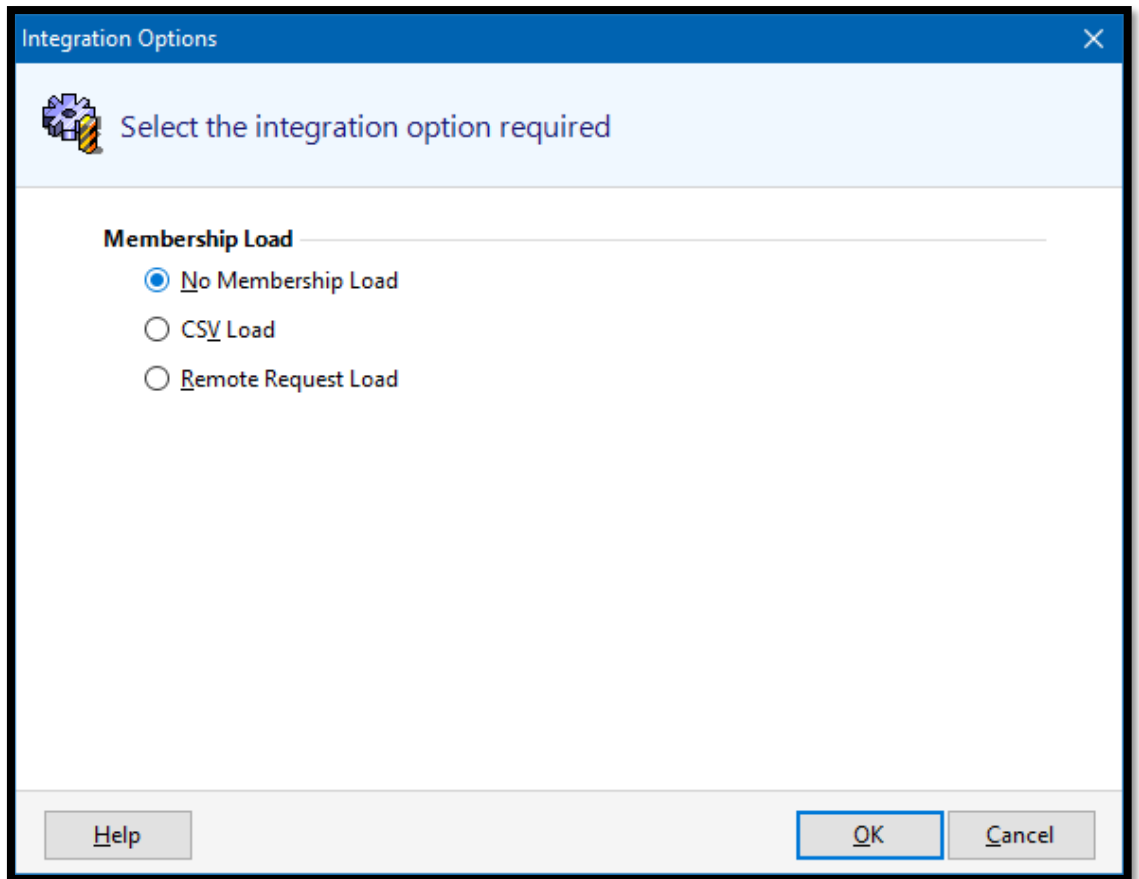
## Activating and configuring the CSV Load Facility

By design, the CSV Load Facility can only be activated and maintained by the ADMIN user in HandicapMaster.
After logging in to HandicapMaster as the ADMIN user on the FILE menu select OPTIONS and then click on the "Integration" tab.



Click the "Configure Integration" button.

Depending on the current configuration any of the three options may be marked indicating the current active configuration.

Select the required membership load and then click OK. Depending on the choice made you may be prompted to confirm the change, or be taken to further windows, or exit the utility.

## 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.

## Remote Request Load

This selection is beyond the scope of this document.

## CSV Loading

If you chose CSV Load the following window is displayed.

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.
  Must be a numeric field.
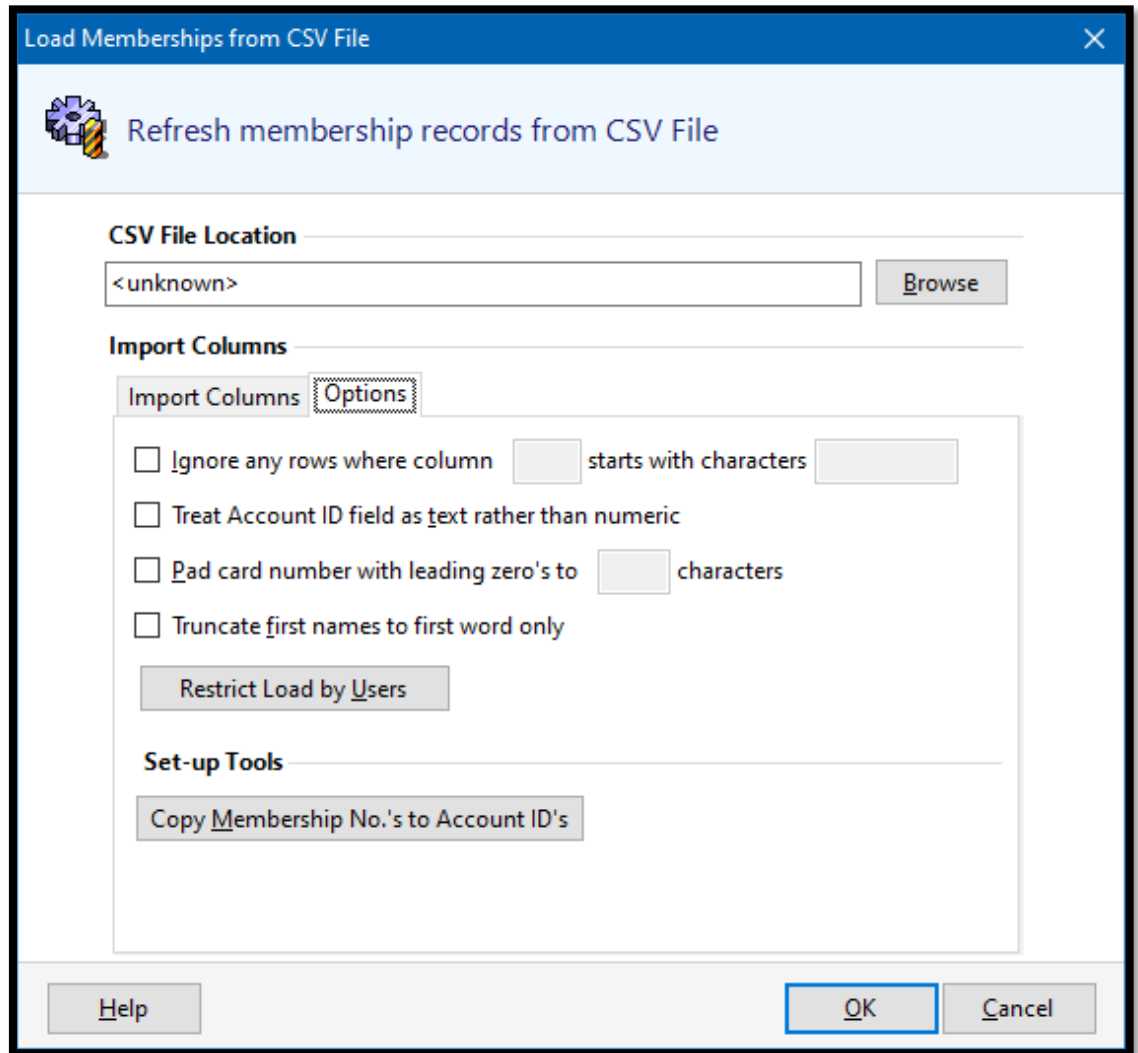
- First Name

- 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.

Note: If a Visitor PIN range has been chosen in HandicapMaster (FILE -> OPTIONS -> MEMBERSHIP) and PIN in this range is allocated to a

Member in the CSV load file then that member will not have their PIN set to that value, but will have a random PIN outside the Visitor PIN range allocated.

## 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.
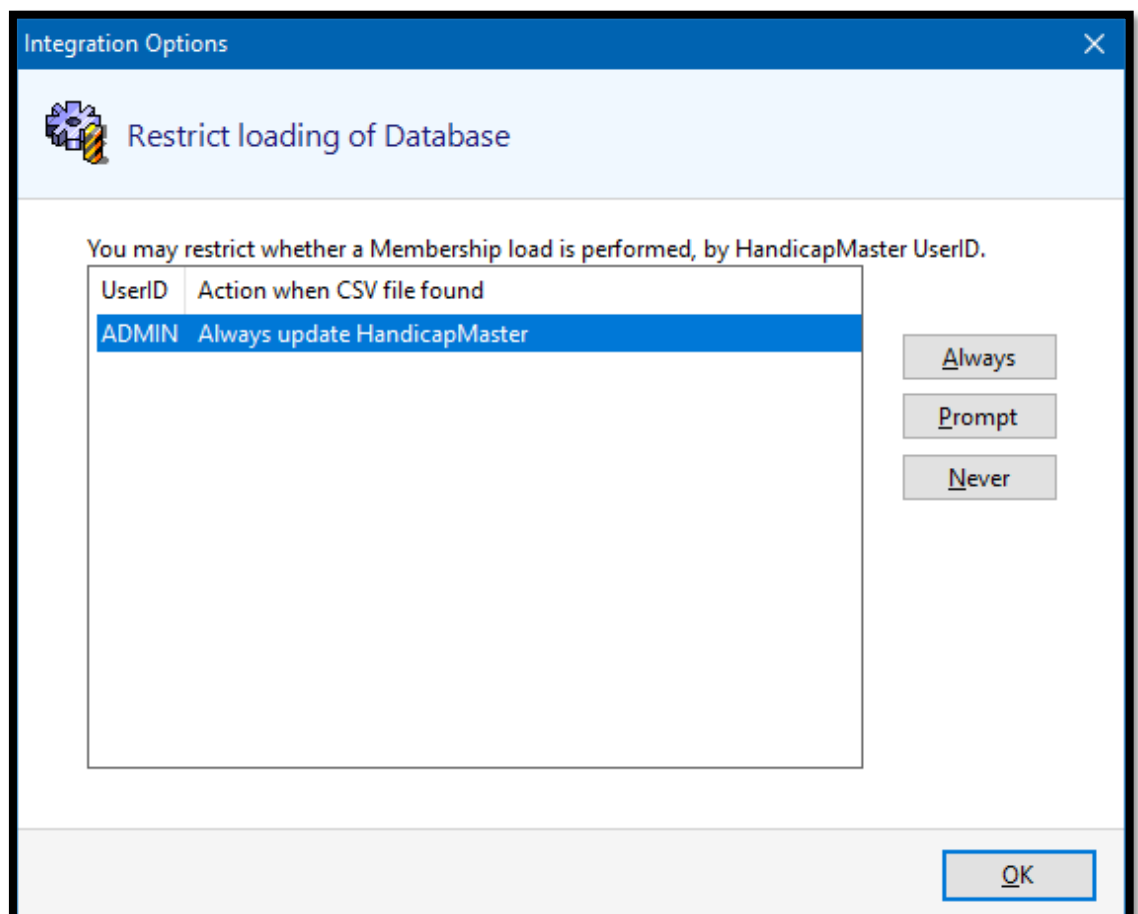
### Truncate First Names to First Word only

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.

### Restricting 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 following 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.

## Setup Tools

These may only be required when initially setting up the facility. Check with your software supplier before using these options.

### 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.

## Reports

### Viewing the current Account ID values in the HandicapMaster database

In order to diagnose problems matching data between the Membership System and HandicapMaster click the **Report Current Account ID's** button on the 'Integration' tab.

This will create a file called "AccountIDs.txt" listing the values currently in the HandicapMaster database (excluding "Past Members").
A message box will display the location of this file. The location depends on the version of Windows on your computer.

The Account ID's will be shown as they will be interpreted according to the current selection for **Treat Account ID field as Text rather than Numeric** option.

## Changes to HandicapMaster when CSV Membership Load is activated

The Edit Member window is amended as follows:
- Membership information is displayed in read-only fields (Golf related fields may still be updated).
- Subscriptions tab is not displayed unless you have the subscriptions option (extra cost option)

The following menu Items are not displayed in HandicapMaster:

Players menu:
- New Member
- Delete Member
- Import
- Officer Titles
- Subscriptions

Reports menu: (unless you have the Subscriptions option enabled)
- Joining dates
- Renewal dates
- Expiry Dates
- Subscriptions Paid Dates
- Subscriptions Amounts Paid

The following menu item is renamed:

Players menu:
- Undelete (becomes Undelete Visitor)

The following menu item is added:

Players menu:
- Load Membership records…

The following "Players Tasks" are not displayed:
- Add a Member
- Delete a Membership Record