GOLD

Golf Club Management System

Interactive User Manual

Produced by M H Systems Ltd.

Index

Click here to find out how to use this manual

How to Use This Manual

Welcome to your copy of the GCGold Manual.

This tour guide has been designed for you to read whilst exploring the system and will help you to find your way around with confidence. It goes through the main features, tells you what each different screen is used for and explores some of the powerful and flexible tools that you now have to assist you in running your Golf Club.

You may open this manual with Acrobat Reader at the same time as having GCGold on your screen and swap between the two by pressing the ALT and TAB keys on your computer simultaneously.

This manual incorporates a number of useful tools which will help you locate the information you require.

Words in Blue - Internal Document Links ⮐

This document is almost one hundred pages long so to avoid you having to use the Page up and Page down keys we provide you with Interactive Links within the Contents section. You will notice that many of the entries have a blue circle at the right hand margin. If you click on this blue link it will automatically jump to the correct section of the manual without you having to negotiate your way to the correct page.

Once you have read the required section press the CTRL and HOME keys on your keyboard simultaneously. This will return you to the Contents page. You will now see that the link you have just used appears a slightly different colour indicating the pages you have used.

Words in Green - Guided Tours and Examples

In a number of sections this manual includes a step-by-step guide to the procedures you should use. Each step is clearly marked in green letters.

Installation

To Install the Software into WINDOWS 3.1^{TM} (not recommended)

- Insert Disk 1 into your floppy drive.
- From the File menu option within Program Manager select "Run".
- Type *A:\setup.exe* and click on OK.
- Follow screen instructions until the installation is complete.

To Install the Software into WINDOWS 95, 98, ME, 2000 or XP^{TM}

- Insert Disk 1 into your floppy drive.
- Click on the Start button on the Windows toolbar and select "Run".
- Type *A:\setup.exe* and click on OK.
- Follow the instructions shown on the screen until the installation is complete.

Guide to Equipment Requirements

For optimum results it is recommended that GCGold is run on a Pentium^{TM} -based computer with 16 Megabytes RAM. Of course any more powerful computer will do, however:-

A working minimum for the GCGold system is a 486 Personal Computer with at least 8 Megabytes RAM although a Pentium is recommended.

It is possible to use GCGold on a 486 computer with as little as 4 Megabytes RAM. This will make the system run much more slowly and you may have to close down some operations before completing tasks which require a lot of memory.

If you have any difficulty installing GCGold please ring for Technical Support on 01732 367 227. Please have your system details (make\model of computer) to hand.

GETTING STARTED – The Opening Screen

To start GCGold, click on the following icon on your computer desktop screen

This is the first screen you see when you start GCGold.

gcgold001.JPG

Accessing the Main Module Button Bar
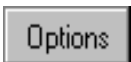
The Main Button Bar is used to access the main Modules within the system (such as the Membership, Competition or Billing Module etc.) within which the day-to-day work takes place.
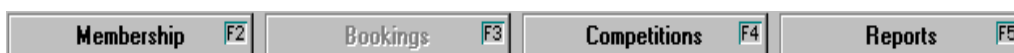
The Main Button Bar is a permanent feature and is always visible and available whilst GCGold is running thus allowing you complete freedom to move around the system at will. Click or press the appropriate function key to go to either the Membership Module (F2), Competitions (F4) or Reports and Billing (F5)

At the top, the bar displays the name of your Golf Club and contains two further buttons

Closing GCGold – Click [Exit] to close GCGold. Your work will be saved automatically.

Program Set-up - The [Options] button opens the User Option window shown on the next page. This opens the golf and administrative set-up modules (see Sections 5 and 6)

Golf Setup (F11)   to set-up your golf courses and medals
Administration (F12)   to set-up your administrative and billing systems

Click on OK to save any changes you have made or Cancel to return to the main GCGold screen.

Central Working Area.

This is the main central area of the screen where the information is displayed. Initially, when you start GCGold, a series of photographs of Golf Clubs will appear in this area. If you are able to provide us with a colour photograph of your club we will be happy to display it on your system.

Module Page Tabs

The information within each module is grouped together and displayed in separate pages. The different pages appear as tabs at the bottom of the screen as shown below.
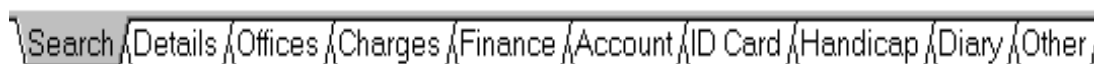
Click on the tab to gain access to the required page within a module.

Note: In the Membership and Competition modules, the first page to be displayed shows a list of the records within that module. Once you have selected a member or competition on this first page the information in the other pages described below will refer to that member.

MODULE OVERVIEW

Section One

The Membership Module

Section 1

Overview of Membership Module

To enter the Membership Module from anywhere within the system, click on the Membership button or press the F2 function key on your keyboard.

gcgold002.JPG

Note: Once you have entered in a module the appropriate button turns black indicating which module you are currently using.

The first screen you see will be the Search page (note the grey tab at the bottom left of the screen). A Control Toolbar is displayed at the top, a list of members appears in the working area and at the bottom a series of tabs provide access to other pages within the Membership Module.

For more information about the Search Page please refer to Section 1.2

Section 1.1 – Control Toolbar - Searching for Records

At the top of the Working Area is the **Control Toolbar.** This is a permanent feature throughout the Membership Module and contains:

1.1.1 Navigation Buttons – Use these to move through the membership list

→ **Go to the last member**
→ **Go to the next member**
→ **Go to the previous member**
→ **Go to the first member**
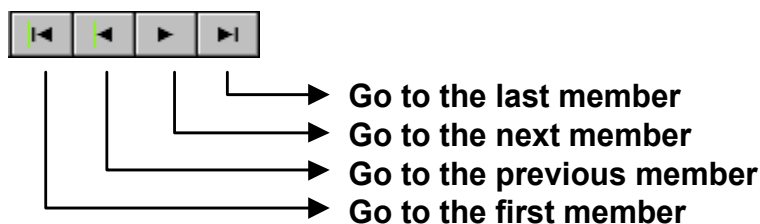
1.1.2 Add, Delete and Edit buttons

→ **Cancel Changes** } only appear when alterations
→ **Save Changes**   } have been made to a record
→ **Delete Record**
→ **Create New Record**

1.1.3 Selecting which records to display on the screen

Clicking on the Filter button [Filter] opens the Membership Filter List.

Use the arrows above and below the date indicators and tick the appropriate boxes in the Membership List Filter screen to include or exclude certain members' records from the display. Any records you choose to exclude will be filtered out from the screen but not actually deleted.

The Filter screen allows you to select and display the following;

> Home club members only or all members by selecting Show All Records

> Members from local clubs only or different clubs other than your own.
  (If you click on the little arrow a list of all the clubs in the country appears)

> Male members only, ladies only or both

> Members within a specific age range

> Members within specific playing categories including or excluding away handicaps

> Members within specific membership groups
  (for more information about Membership Group Codes please refer to Section 6.6)

1.1.4 Selecting the order of display

The **Sort Order** check boxes ☑ By <u>N</u>ame ☑ <u>M</u>embers Only allow you to sort the list displayed in the search page by name or by membership number and whether to include members only or all records. Use the left mouse button to put a tick into the required option and validate the Sort Order by clicking on the OK button.

1.2 Membership Search Page

This is the first page that is displayed when you click on the Membership button at the top of the screen and you will see the Search tab greyed out at the bottom. You can return to this page at any time by clicking on this tab.
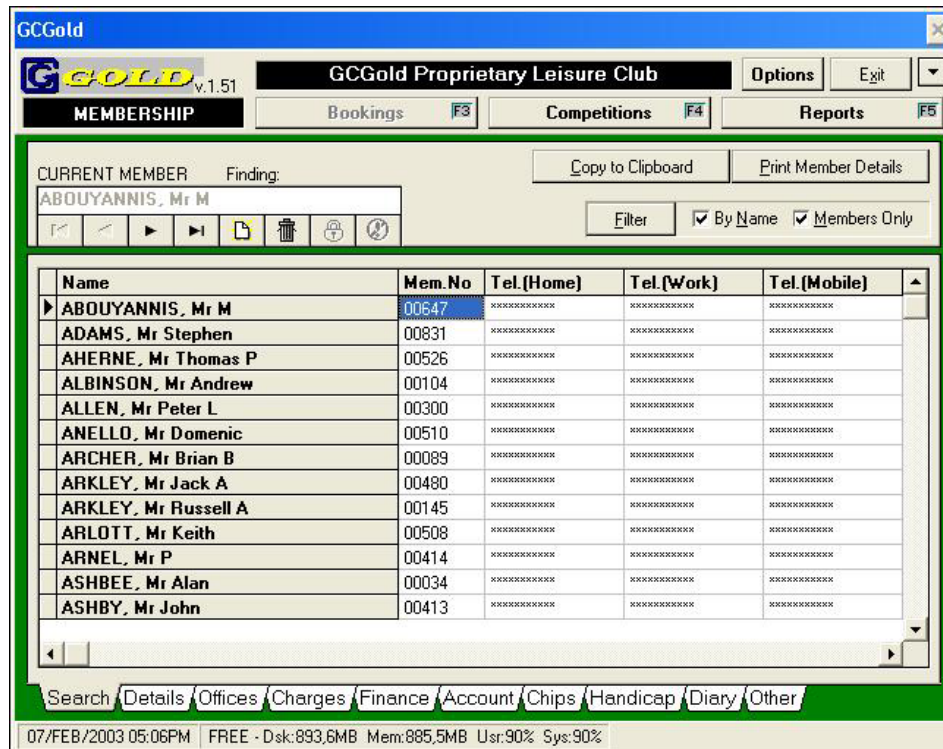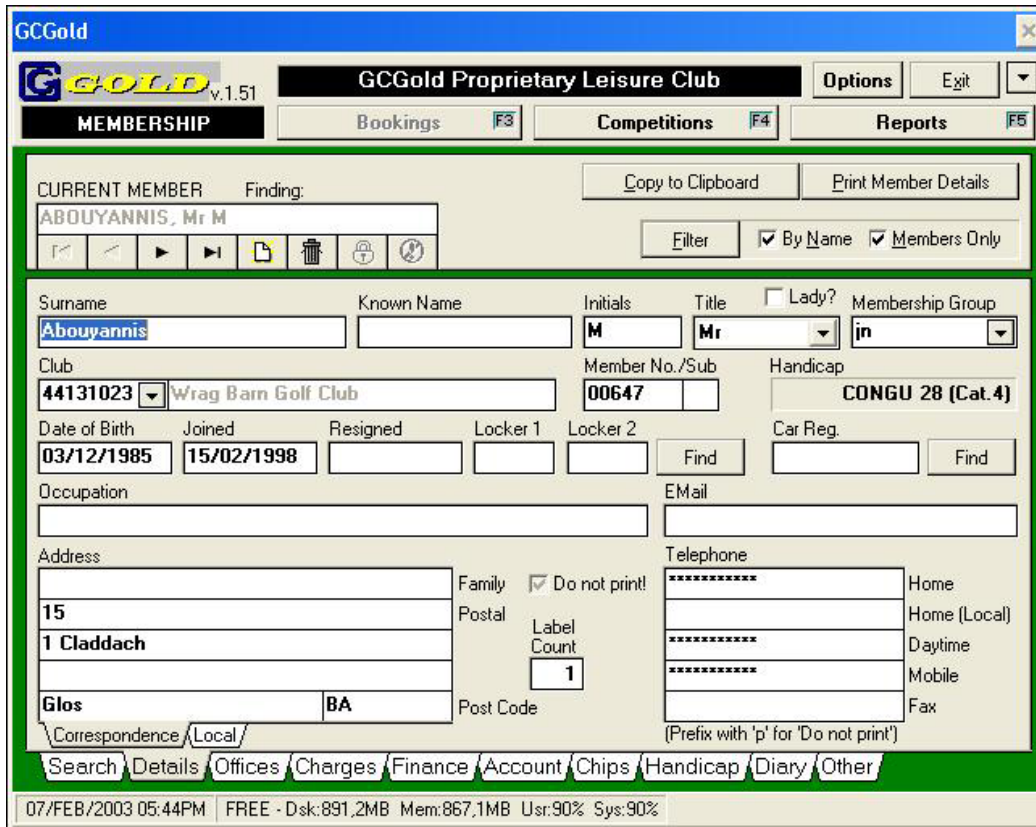
gcgold002.JPG

This page displays the **Membership List** with a summary of each individual member shown across the screen. If you wish to view information which is beyond the right hand side of the screen and not immediately visible, use the arrow Keys on your keyboard to move the cursor from box to box.

1.2.1 Finding a member in the search list

Using the mouse -   Click the mouse on the scroll bar on the right of the screen and use this to move up and down the list. Once you have found the member record you want, click with the left mouse button on the record in the list.

Using the keyboard -   If the list is sorted by name, type in the first few characters of the member's surname on the keyboard. The system goes to the desired record. If you sort by membership number, perform the same process but enter the number.

1.3 Members' Details Page

gcgold003.JPG

This page displays the full details of the member's record currently selected. It is also the screen displayed when you select to **Add or Edit** a member from your system.

1.3.1 To Add a New Record   Click on [icon] New button and the system will display an empty details sheet. GCGold will automatically allocate the next free membership number although you can change this if you wish.

Fill out the form, click on [icon] Padlock to save or [icon] Cancel to return to a blank record if you have made a mistake

1.3.2 To Edit a Record   Click on the appropriate box and enter your modification

Having made the changes click on [icon] to save or [icon] to return to a blank record if you have made a mistake

1.3.3 To Delete a Record   Click on [icon] Delete to delete a record. This can be done from either the Details page or the Search page.

Note: GCGold will not allow you to delete a members record if their account balance is not zero. It will prompt you to amend the account and you may then delete the record.

1.4 Members' Offices Page

gcgold004.JPG

This page shows a complete record of the **Offices** held by a member. These are allocated in the Options – Administration - Committee page described in Section 6.7.

1.5 Members' Charges Page

gcgold005.JPG

The larger of the two windows to the left displays the default charges and discounts that have been associated with a member's group code. Once specified GCGold automatically applies these default items (for information specifying default charges and discounts refer to step 2 within Section 6.2.1 and 6.3.1). If you wish, however, you can override the default items or add additional charges and discounts as required.

1.5.1 Overriding Default Charges and Discounts

To override a default charge or discount displayed in the Group Charges and Discounts list select the item concerned and click on the [Override--->] Override button at the top of the screen. This will activate the override section at the bottom of the screen.

You may now make the required alterations to the code. For instructions on how to specify the details of charges and discounts please refer to Section 6.3.

1.5.2 Adding additional Annual or Ad-hoc Charges and Discounts

Click on the Additional/amended charges window on the right of the screen and press the **insert** key on the keyboard. The Price List window appears showing a list of periodic charges. If you wish to add a discount rather than a charge, click on the Show Discounts button at the top.

Select the required additional charge (for example a standard locker fee) and click on OK. The new charge will be shown in the list of additional charges.

1.6 Members' Finance Page

gcgold006.JPG

This page shows the financial details of a member. It also allows you to add a default payment scheme for each individual member.

1.6.1 Adding a Default Payment Scheme

Click on the [Set] button and a list of available Payment Schemes appears. For more information on creating and offering payment schemes please refer to Section 6.4.

The Notes/Reference section allows you to add any ad-hoc notes you wish to keep relating to a member.

1.7 Members' Account Page

gcgold007.JPG

This page shows details of all the transactions that have occurred in a member's account. You are able to enter payments, issue credit notes, enter any ad hoc payments made by a member into a specific club fund and view the current aged balance of account.

1.7.1 Viewing Transaction Details and allocating Payment Schemes

Select the transaction from the list and click on the [View/Terms] button.

The details of that invoice will appear along with a box where you can set a payment scheme.

1.7.2 Entering a Credit

Select the transaction you wish to credit with the mouse and click on the [Credit] button. A new line will appear in the list showing that the invoice has been credited and the account adjusted accordingly.

1.7.3 Entering a Payment

Click on the [Payment] button to display the following window;

PAYMENT DETAILS

Date
13 Mar 98

Payment Amount
80.60

Method | Reference

[OK] [Cancel]

Enter the date and amount of the payment along with a reference which will appear alongside the item in the list.

1.7.4 Fund Payments

If the member wishes to make a payment to a fund then click on the [Funds] button. This will bring up the following window.

FUND PAYMENT DETAILS

Date
13 Mar 98

Payment Amount | Fund
25.00 | Christmas Fund

Method | Reference
CASH |

[OK] [Cancel]

Enter the date of the fund payment, the amount, the method of payment and a reference which will appear by the item in the account list. Click on the Fund box to see a list of all the funds which you have created in the Administration Set-up module (refer to Section 6.5).

1.7.5 Viewing Aged Debts

The panel to the right of the screen shows a summary of the debts and their respective ages. You may select the date from which you wish to view the record. Once a debt is overdue a red spot will appear next to it allowing you to quickly scan for aged debts.

Aged debt as of...	
01 Mar 98 ↓	
Days	**Balance (£)**
90+	0.00
90-61	0.00
60-31	0.00
30-0	0.00
1-30	0.00
31-60	80.60
61-90	80.60
91+	80.60

1.8 Members' ID Card Page

This feature will be available in a future release.

1.9 Members' Handicap Page

gcgold008.JPG

This page shows a member's Handicap history. This record is automatically updated by GCGold when appropriate. In this page you are able to enter EDS, away results, make Clause 19 or Regulation 7 amendments and print handicap certificates and records.

The handicap record and a handicap certificate can be printed by clicking on the appropriate buttons at the bottom of the page.

The system also enables you to produce a range of other documents such as Handicap Analyses, Handicap Lists, LGU Exchange and Summary sheets, but as these relate to all your members and not one specific record we have placed them in the Standard Reports module (please refer to Section 3.1).

1.9.1 Viewing Handicap Records and Competition Results (CONGU and LGU)

Basic information such as the current handicap, medal group, home handicap club and membership number are displayed above the handicap record.

Each competition result is shown in the list beneath along with the specific details of that result. This information is entered automatically by GCGold.
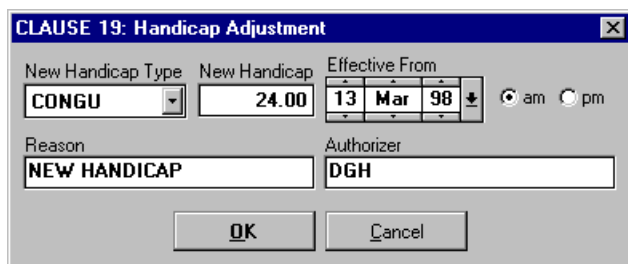
NOTE: All CONGU handicaps are automatically updated immediately a competition result is posted. LGU handicaps, however, are recorded and stored within the system but the handicap itself will not be updated immediately. All LGU handicap changes will be posted and updated at midnight on the 7th day of each month.

1.9.2 Manual Handicap Alterations – New Handicap

The button on the right of the three at the bottom of the screen allows you to make manual handicap adjustments. The title shown on this button changes depending on the member selected and their handicap status.

If no handicap has been assigned to a member the button will say

Assign new handicap . Clicking on the button opens the Clause 19 handicap adjustment window.

Select the handicap type, value and effective date in the top line. Enter a reason for the change and your initials in the Authoriser box and click OK. The member will now be shown with the new handicap appearing in their record.

1.9.3 Manually amending a CONGU Handicap

If a CONGU handicap is already assigned the button will say Enter Away Result . Clicking on the button opens the Clause 19 handicap adjustment window. This will then allow you to enter either an Away Result or make a Clause 19 adjustment

Away Result
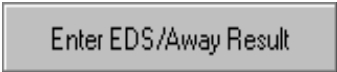
To enter an away result, insert the information into the boxes and click OK.

Clause 19

The button opens the Clause 19 adjustment window shown on the previous page. Follow the instruction described in Section 1.9.2

1.9.4 Manually amending an LGU Handicap

If an LGU handicap is already assigned the button will say . Clicking on the button opens the Away/Extra Day Score window. This will then allow you to enter either an Away Result or make a Regulation 7 adjustment in the same way described above for CONGU handicaps.

1.9.5 Printing a Handicap Record

Click on the to print off the record for the selected member.

1.9.6 Printing a Handicap Certificate

Click on the to print off a certificate for the selected member.

Note: GCGold will only include events which have occurred after the "Start Handicap Certificate Date" which is specified in the Options – Golf Setup module (please refer to Section 5.3)

1.10 Diary Page

This feature will be available in a future release.

1.11 Other Page

gcgold009.JPG

That page allows you to hold any notes or comments in a member's record such as the fact, they are being proposed and seconded for holding a position on a committee (note the boxes to show who these people are at the bottom of the screen). It also allows you to access any of the User Defined Flags or Codes you have created in the "Options – Administration – Other" page. These are primarily for use in the Report Generator and are discussed in more detail in Section 6.8

MODULE OVERVIEW

Section Two

The Competition Module

Section 2

Overview of The Competition Module

To enter the Competition Module from anywhere within the system, simply click on the Competition button or press the F4 function key on your keyboard
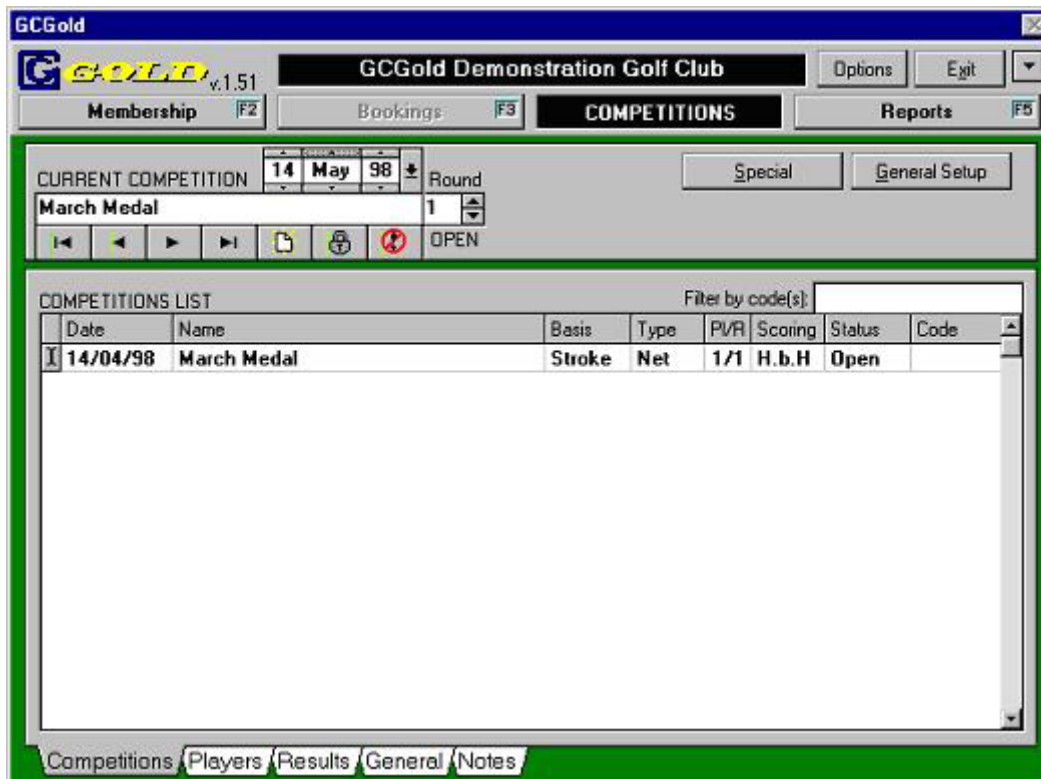
gcgold010.JPG

The first screen you see will be the Competitions list page (note the grey tab at the bottom left of the screen).

This screen displays a list of all the competitions you have created on your system including those you have held in the past, those currently open and those which you have created for use in the future.

As in the case of the Membership Module a Control Toolbar is displayed at the top, and the opening page shows a list of all the competitions created using GCGold. At the bottom of the screen are the tabs which provide access to the other pages within the Module.

Section 2.1 – Competition Control Toolbar

The **Control Toolbar** here is slightly different to that within the Membership Module described in Section 1.1. This is also a permanent feature throughout this Module and contains:

2.1.1 Navigation Buttons – Use these to move through the list of competitions.

> ➤ **Go to the last competition**
> ➤ **Go to the next competition**
> ➤ **Go to the previous competitio**
> ➤ **Go to the first competition**
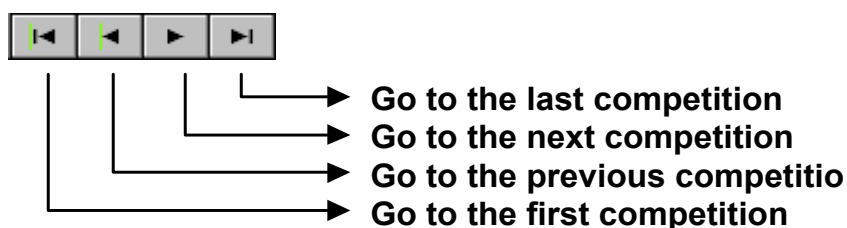
2.1.2 Adding and Editing a Competition

> ➤ **Cancel Changes** } only appear when alterations
> ➤ **Save Changes** } have been made to a competition
> ➤ **Create New Competition**

NOTE: The delete button shown in other modules has been removed to avoid accidental deletion of a whole competition. If you wish to delete a competition, select it in the list and press the control and delete keys simultaneously. The competition will be deleted and any adjustments made to the competitors' handicap records removed.

2.1.3 Competition Dates

The date displayed at the top of the Control Toolbar allows you to change the date upon which a competition is to be held by clicking on the arrows above and below the day, month or year figure. However, this can only be done if the competition status is shown as OPEN.

2.1.4 Selecting Rounds and Viewing Competition Status

To the right of the competition date is the Round Selector and status indicator. As with the membership module all other pages will show details of the competition selected in this first page, however, for multi-round competitions you must select both the competition from the list and which round you wish to view to gain access to the correct data.

2.2 Competition Search Page

gcgold010.JPG

This page is similar to the "Search" page of the Membership Module in that it shows you a list of all the past, current and future competitions stored in the system. The above example displays only one competition but this will obviously build up into a full library as you continue to use the software.

The details of each competition are shown in the columns across the page, as follows;
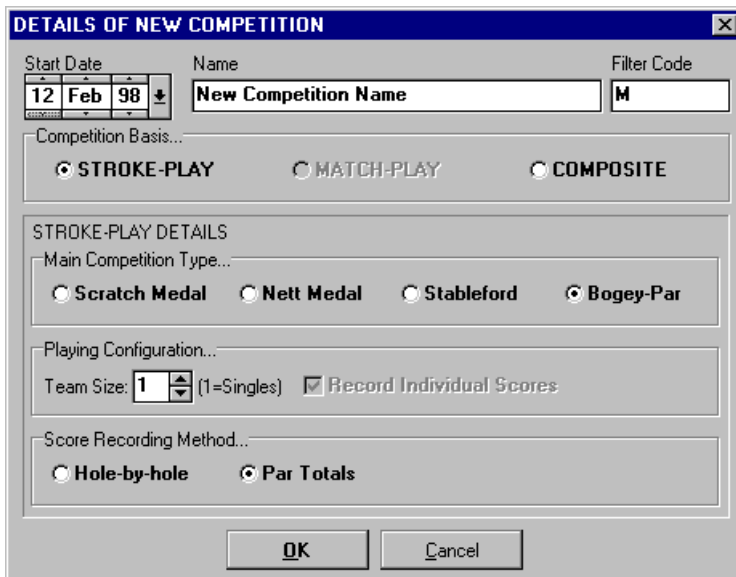
> Date: the date the competition took place or is to take place.
> Name: the name given to a competition when it is created.
> Basis: Displays whether the competition is Stroke-Play or Composite.
> Type: Shows the type i.e. Scratch or Nett Medal, Stableford or Bogey-Par.
> Pl/R: Shows the team size and number of rounds in the competition
> Scoring: Indicates whether scoring is Hole-by-Hole or Par totals
> Status: Shows if the competition is currently open or closed.
> Code: Allows you to enter a code to set which competitions appear in the list.

2.3 Creating a New Competition

For instructions on how to create and run a competition please refer to this Section and follow the steps shown on the screen in green ink.

2.3.1 Step One - Specifying the Competition Details

Clicking on the [icon] button at the top of the screen opens the new competition details window as shown below.
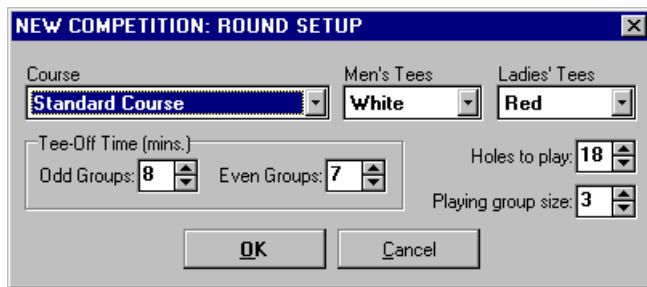
a) **Enter the following basic details into the boxes provided**
   Start Date: Enter the date the competition starts
   Name: Enter the name you wish to appear in the competitions list page
   Filter Code: Enter this code if you wish to use the filter in the Competitions List.
                 (e.g. M for Men, L for Ladies, J for Junior or MX for mixed)

b) **Specify the Competition Basis**
   Select the basis for the competition by clicking on Stroke-Play or Composite

c) **Stroke Play Details**
   Select the Stroke Play of the competition by clicking on the required box.

d) **Playing Configuration**
   Enter the team size (select 1 for singles) and whether to record individual or team totals.

e) **Score Recording Method**
   Select whether to score hole-by-hole or Par totals

Once you have completed this stage click on the OK button. You will now see the Round Setup dialogue box shown below

WARNING: The option above cannot be changed once the competition is created

2.3.2 Step Two - Setting up the Rounds
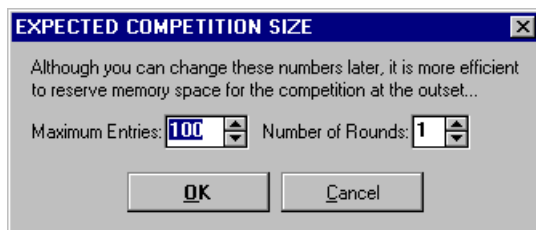
This screen allows you to select;

Course:	This list box allows you to select the course for the competition.
Tees:	Select the men's and ladies' tees.

NOTE: Both the above items must first be set-up in the Golf Setup module. For more information please refer to Section 5.5 for setting up course details and tees.

Tee Off Time:	Use the arrows to set the tee-off time in minutes.
Holes to Play:	Select the total number of holes in the competition round.
Playing Group size	Use the arrows to select the playing group size.

2.3.3 Step Three - Specifying the Competition Size

Use the arrows to select:

Maximum Entries:	The number entered here instructs the computer to add that number of free slots to the players list. It does not restrict you from more than the number shown here if you wish and is primarily for convenience.
No. of Rounds:	Select the total number of rounds for the competition

To complete the set-up process click on the OK button. This competition will now appear in the list on the first page of the module.

2.4 Players' Page – Adding Competitors and Scores

gcgold011.JPG

This page is primarily used to add, edit and delete players from a competition, entering the scores (unless these are done by the players themselves using our Player Score Input Touchscreen), and holding the draw. First select the competition you wish to work with from the Competition List page.

2.4.1 Step Four – Adding a competitor

Click on the **Next** button at the bottom of the screen. The cursor will move to the next free slot (or it will create a new free slot if you have exceeded your maximum expected entry figure).

A list of players will appear in the right half of the screen. Either use the scroll bar or start typing the surname on the keyboard to locate the player in the list. Once **highlighted**, pressing the return key or clicking on the name with the left mouse button will now add this player into the competition player list on the left of the screen.

If the competition is for Singles, one name will appear in each line. If the competition is for pairs you may add a second name to one already in the list and then type in a team name at the top right. The team name is optional and will appear in the player list rather than the two individual names.

a) **Viewing a Players' Details**

Click on the player (or team name) in the left-hand list. The player (or players) names will appear in the box underneath the Team Name box along with their membership number, exact and playing handicaps. If you wish to see a summary of that player's details click on the Details button.
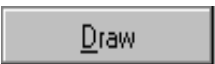
b) **Deleting a Player from a Competition**
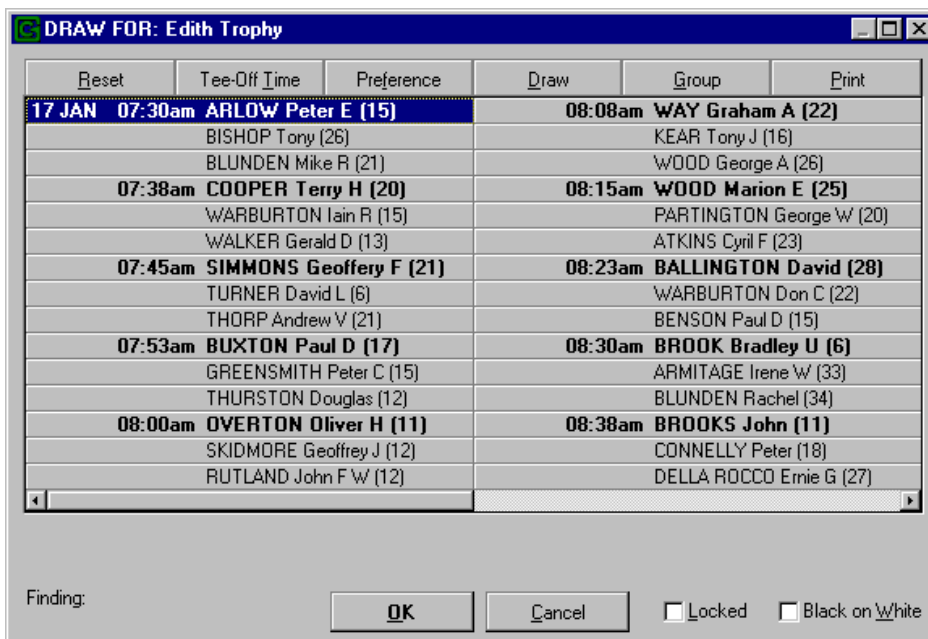
Click on the player (or team name) in the left-hand list. Press the CTRL and Delete keys simultaneously. You will be asked to confirm if you wish to delete this player. Click on OK to remove them from the list.

c) **Selecting which Players are eligible for a Competition**

Click on the [Member Filter] button at the top right of the screen. The screen that appears allows you to select which players appear in the player list. This box is identical to the one used in the Membership Module described in page Section 1.1.3. If the filter is set correctly only eligible players will appear in the list preventing any accidental but incorrect inclusions into the competition.

2.4.2 Step Five – The Draw, Printing Score Cards and Start Lists

Click on the [Draw] button at the top of the screen to see the following window.

To start, the players and their handicaps will appear in the time slots in the order you added them to the competitor list. The time slots have already been configured when you set-up the competition. You can affect the draw in several ways using the buttons at the top of this screen.

Tee-Off Time ➜

Use the date and time controls to set a starting time for this and subsequent playing groups. (This creates a 'session'). To revert to the normal date and time within the current session, set the 'Reset' checkbox.

Date: 17 Jan 98 ⬍
Time: 07:30am ☐ Reset

OK   Cancel
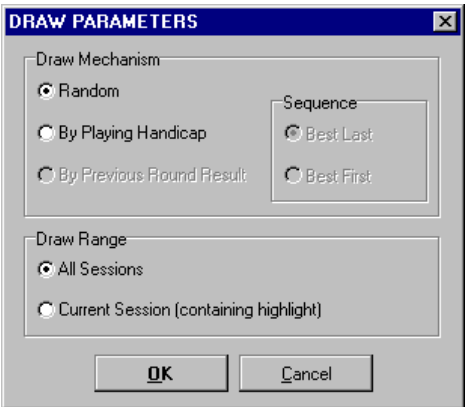
Allows you to specify a different start time for a specific group. All subsequent groups will also be re-timed accordingly and a new playing session will be defined.

Preference ➜

DRAW POSITION PREFERENCE ☒

Preferences for: ARLOW Peter E
⦿ Any Time   ○ Later
○ First (Scorers)   ○ Latest
○ Earliest   ○ Last (Starters)
○ Earlier

OK   Cancel
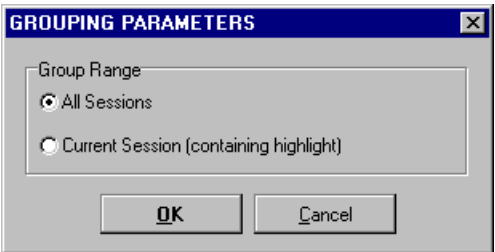
Allows you to set the individual preferences for each player (or team). These changes will be taken into account when the draw is made.

Draw ➜

DRAW PARAMETERS ☒

Draw Mechanism
⦿ Random
○ By Playing Handicap
○ By Previous Round Result

Sequence
○ Best Last
○ Best First

Draw Range
⦿ All Sessions
○ Current Session (containing highlight)

OK   Cancel

Performs the draw and allows you to select the draw mechanism. Clicking on OK performs a draw which can be applied to either the whole competition or, by first clicking on a player in a particular session, just the players within that session and not the rest.

Group ➜

GROUPING PARAMETERS ☒

Group Range
⦿ All Sessions
○ Current Session (containing highlight)

OK   Cancel
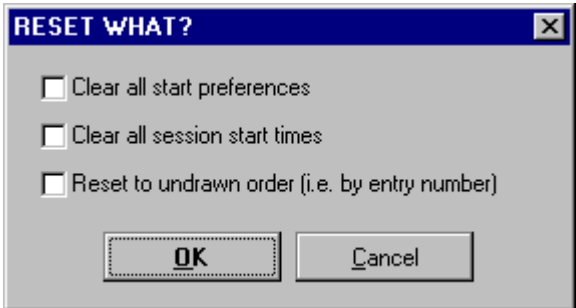
Allows you to group the competitor list either for all, or for one specific session.

Print ➜

Allows you to print the start list and the scorecards. These must first be created in the Define Score Cards page of the Golf Setup Module.

Reset ➜

RESET WHAT? ☒

☐ Clear all start preferences

☐ Clear all session start times

☐ Reset to undrawn order (i.e. by entry number)

OK   Cancel

Allows you to reset and re-configure aspects of the draw.

2.4.3 Step Six – Entering the Scores

If you have our Remote Score Card Input module then players may enter their own scores on the touch-screen. If you do not, then enter the scores in the Players Page. How you do this depends on which option shown below was selected when the competition was created.

a)   Hole-by-Hole Scoring

Singles: If you have selected Hole-by-Hole scoring when creating the competition, first select the player from the list on the left with the left mouse button and then click on the white square at the bottom right of the screen next to the word "Gross" and underneath hole number 1. Enter the score for hole one. The cursor automatically jumps to hole two. Type in the score for the second hole, then the third, and so on until all scores are entered. You will see that GCGold now shows both the scores for the first and last nine holes, and the total underneath. This score also appears next to the player in the competitor list.

Teams: Select the team in the competitor list using the left mouse button. The names of all team members will appear immediately above the scoring grid. Select the individual player from this right hand list and add their scores in the way described above for singles. Once done, select the second player from this team and add their scores. Continue until all scores are entered for that team. The team points in the left hand competitor list will then be updated. GCGold will automatically take into account each player's handicap when calculating the overall results for that team.

b)   By Par Totals (singles and teams)

If you have selected Par Totals scoring when creating the competition, first select the player or team in the competitor list. Click on the Total score at the very bottom right of the screen (which will also show if the total score is Nett, Gross, Stableford or Par). Enter the total score which will then appear as the points in the competitor list.

2.4.4 Step Seven – Closing a Competition

Once all the scores have been entered, click on the [Close Round] button in the Results Page.   Before GCGold closes the competition the following window is displayed.

CLOSE ROUND

When a round is closed, the following occurs:
1. The playing handicaps are refreshed from the handicap records.
2. If applicable, entries in the handicap records are made.
3. Scores for the round may no-longer be amended (unless the round is re-opened).

NOTES:
1: Refreshing the playing handicaps will not change any overridden playing handicaps.
2. Refreshing the playing handicaps may alter the results.

Competition Qualifying Status: ☑ CONGU   ☐ LGU   ☐ Junior (using CONGU rules)
Disallow handicap increases: ☐   ☐
Apply Clause 19.8: ☑

[OK]   [Cancel]

2.4.5 Processing Competition Results

This allows you to specify what happens when you close a competition. The tick boxes allow you to specify whether the competition has a CONGU or LGU qualifying status and whether to disallow handicap increases and apply Clause 19.8. These boxes will be greyed out if not appropriate according to the type of competition you have run.

Clicking on OK instructs the computer to process all the scores, calculate the CSS and update the players' handicaps (if appropriate) and close the competition.

2.4.6 Re-Opening Competitions

The Close Round button will now change to say [Re-Open Round]. Although closing the competition will affect the handicap record of each player you may re-open the competition using this button, make any alterations you wish to do and click on the button again (on re-opening the competition this button will revert to say Close Round).

2.5 Results Page – Viewing and Printing Results

gcgold012.JPG

The Results page can be used at any stage of a competition whether it is still in progress or has been closed.

Once you have entered some (or all) of the scores the Results page shows a list of the completed results. If a score has not yet been entered for a player their Score will display a question mark. This page allows you to view and print the results in a variety of formats and subsequently close the round.

Refresh Player Details	If, for whatever reason, a player's details change mid-competition, this button refreshes all competitors' names, medal codes and handicaps and updates the competition accordingly.
Close Round	When all scores are entered, clicking on this button closes the round and automatically updates each competitor's handicaps.
Show CSS Calculation	Clicking on this button shows you the CSS calculation for the competition.
Setup Results List	Click here to enter the Setup Results List feature (see below)
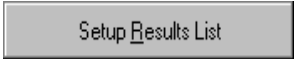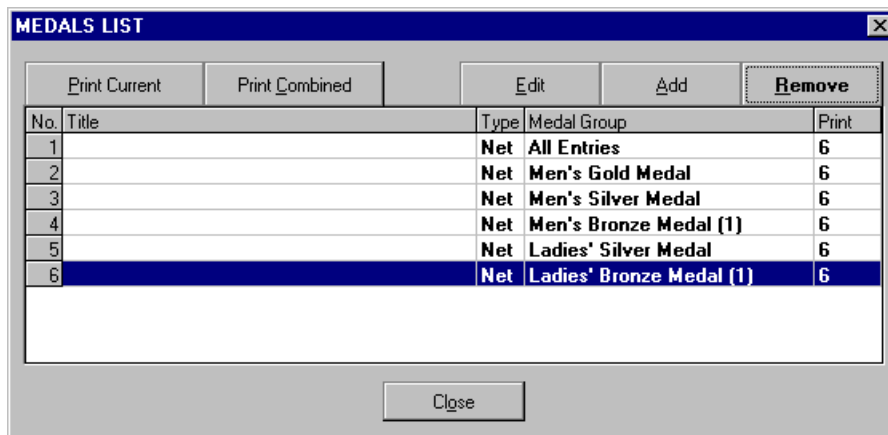
2.5.1 Step Eight – Setting Up the Results List

Clicking on the [Setup Results List] button on the Results page opens the following window.

This feature allows you to view and print the results of a competition in a wide range of formats.

Clicking on [Print Current] prints the medal currently selected in the list.

Clicking on [Print Combined] prints the results in all formats specified in the list.

2.5.2 To Add a New Result Medal Print Format

To create a new result print-out, click on the Add button on the right of the screen. The following window is displayed:

Title (for printing)

Type a name for the Result (for example, Men's Gold Medal). This title will appear next to the item in the list making it easier for you to recognise it if you wish to select that specific print out.

Select Medal Group

Clicking on the little arrow at the very top right of the screen will drop down a list of Medals categories which have been set-up in the Medals List of the Golf Setup module accessed via the Options button. Each Medal will describe a particular category of player including their sex, age, handicap range and handicap type. Select the required medal code by clicking on it in the list with the left mouse button.

Limit Allowances

If you wish you may select a Nett Allowance and Maximum Handicap limit for this print out (if the medal code handicap range is inappropriate).

Multi-Player Scoring

For more information on using this feature in team competition please refer to Appendix A.

Number of Results to Print
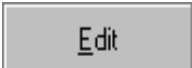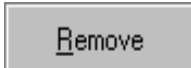
Here you can select a specific number of results within the Medal Group selected above (for example, the top three Men's Gold Medal results). You can also select None, or All which overrides any specific number shown in the right hand box.

Having configured your printout click on the OK button. You will return to the Medals List window and the print-out will now appear in the list for you to use. In the example below we have added a print-out of the top three results of the Men's Gold Medal.

No.	Title	Type	Medal Group	Print
1		Net	All Entries	All
2	Men's Gold Medal Top Three	Net	Men's Gold Medal	3

MEDALS LIST — Print Current, Print Combined, Edit, Add, Remove, Close

The **Edit** and **Remove** buttons are used to alter or delete a medal print format.

2.5.3 Step Nine – Printing Competition Reports

Once you have completed and closed a competition (by clicking on the "Close Round" button), the Print Reports button will be enabled. This allows you to print out the following reports:

Competition Reports

Handicap Changes and Round Results (sorted by name)
Handicap Changes and Round Results (sorted by placing)
Hole-by-hole Gross Score Archive

General Results Print Out Options

This feature allows you to add a Prefix and Suffix to your results printouts (for example March Medal at the top and the date at the bottom). These will appear each time you print your results and are specific to each competition.

MODULE OVERVIEW

Section Three

The Reports Module

Standard and Custom Reports

Section 3

Overview of The Reports Module

gcgold013.JPG
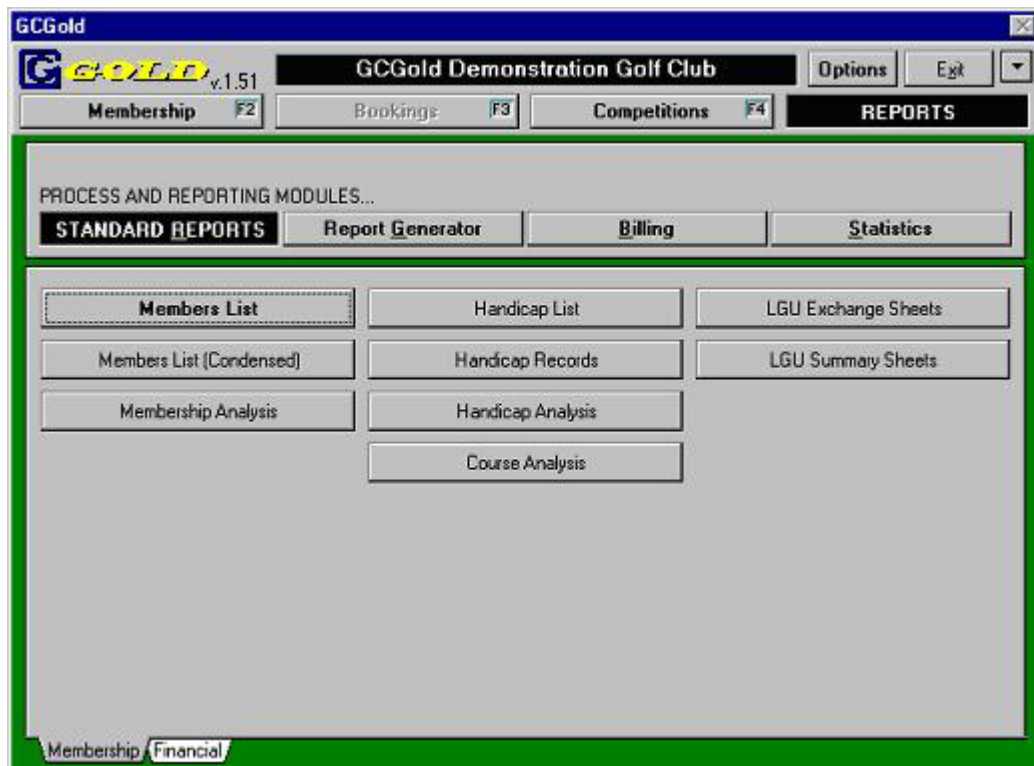
The Reports Module can be accessed from the main menu by a click on the Reports button or the F5 key on the Keyboard. This module provides many different powerful tools both for creating standard and bespoke reports as well as generating all your bills.

This module contains three sub-modules represented by the set of buttons underneath the main module buttons (the Statistics sub-module is, as yet, not available). Each sub-module includes its own set of pages providing additional features such as label generators and mail-merge tools allowing you to create large numbers of personalised documents and envelopes in virtually no time at all.

The three sub-modules are:

Standard Report - Prints out the most commonly used membership and financial reports used by Golf Clubs.

Report Generator - This is a powerful tool which you can use to create, save and re-use reports of your own design.

Billing - This module allows you to create all your invoices and credit notes. Once you have configured your system the laborious task of generating all your bills becomes the matter of a few clicks of the mouse.

3.1 Standard Reports

The following reports are available from the two page tabs at the bottom of the screen.

3.1.1 Membership Page

| Members List | Prints a full list of all members in your system including the addresses. |

| Members List (Condensed) | Prints just the names and telephone numbers |

| Membership Analysis | Prints a list of your membership group codes and the number of members contained within each group. |

| Handicap List | Prints a list of Handicaps of all club members |

| Handicap Records | Prints the handicap records for members. You can select which categories are included in the print-out |

| Handicap Analysis | Prints out a handicap analysis. Again, you can select the player criteria included in the report. |

| Course Analysis | Prints out a performance hole-by-hole analysis over a specified period |

| LGU Exchange Sheets | Prints out the LGU Exchange sheets for a specified period |

| LGU Summary Sheets | Prints out the LGU Summary sheets for a specified period |

3.1.2 Financial Page

| Invoice Analysis | Prints an analysis of your bills. When you click on this button you are asked to select a number of parameters for the print-out including a date range between which bills should be included in the report and the primary analysis field. This can be by batch number, membership code, price code, nominal code or one of three user-defined charge analysis codes. |

| Payments Analysis | Prints an analysis of all payments. Clicking on this button asks you to select a date range in order to show payments to be in the report. |

| Aged Balances | Prints an analysis of all aged debts. When you click on this button you are asked to select a date of reference from which the age of the debts should be taken and the ages of the debts to include in the reports. |

| Fund Payments | Prints a summary of all fund payments paid. You can select which fund you wish to analyse and the date range to include. |

3.2 The Report Generator

gcgold014.JPG

The Report Generator is a tool which you can use to create, save and re-use reports of your own design. Almost all of the data contained within GCGold, such as membership details, handicaps and certain financial information, can be included within a report. Once you have selected the data fields you wish to include within the report, you can filter the output to make the report more specific making the task of analysing your data easier and more efficient.

The basic features of the Report Generator are identical to any standard Windows program. You will see that the toolbar towards the top of the screen contains a number of buttons which allow you to create new reports, print the output, save the reports once you are happy with the output and re-open them again in the future. Creating labels is made easy using the label button and a mail-merge facility is provided to allow you to export data to other Microsoft tools such as Microsoft Word or Excel.
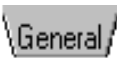
Generating a Custom Report
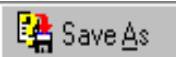
For instructions on how to create and print a custom report please follow the steps shown in green. We have provided an example to help you.

EXAMPLE

As an example we will create a report to include all the male "Joint" members aged between 25 and 35 who possess a locker and whose surname starts with a letter between A and M. Whilst this may not be a report you ever wish to produce it introduces most of the techniques used for any other report.

3.2.1 Step One – Creating a New Template and Specifying the Basics

Click on the `\General/` tab at the bottom and then `New` at the top of the screen.

Type a title in the white box towards the top of the window and click on the `Save As` button. Type an **eight-character** name under which to save the file (as if you were saving a file in Microsoft Word or any other word processor) and click on OK. GCGOLD returns you to the initial page and the file name will be shown above the New button.

This opening screen allows you to format how the report appears when you print it. The effect of the options within this screen depends on a number of factors such as the printer you are using and the size of paper used etc.. For more information on formatting report appearance please contact MH Systems Ltd.

3.2.2 Step Two – Building your Report by adding Columns

First we need to select the data to be contained within the report. Click on the `\Columns/` tab at the bottom of the screen and you will see the following Window split into three vertical sections.
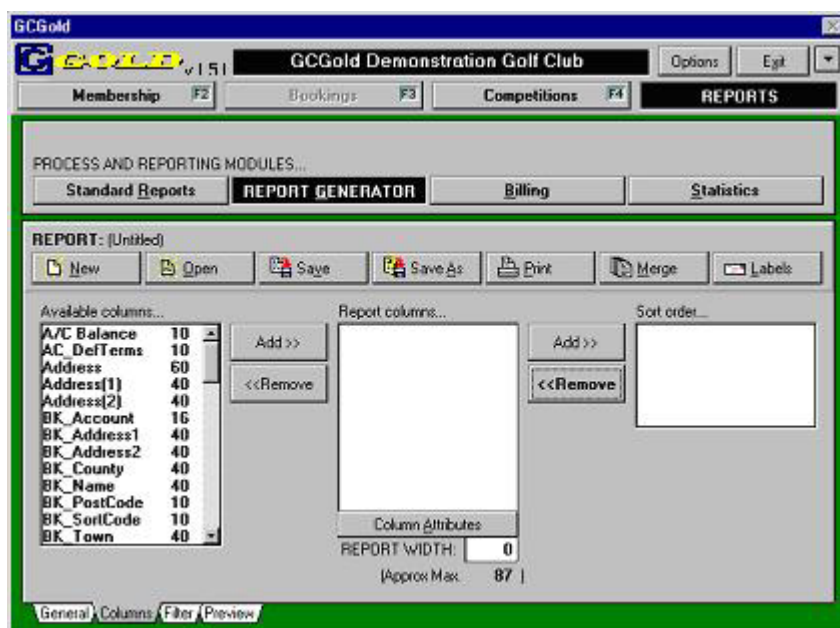
gcgold015.JPG

A)   The left hand column called Available columns…shows all the fields of data available for you to include in your report (for a full list of the fields available please refer to Appendix B)

B)   The middle column called Report columns…shows the list of the fields that have
      been selected and will be included.

C)   The column to the right called Sort order…shows the field data which will be used
      to sort the report output.

To build a report you must transfer the relevant fields from the left to the middle column.

To add a column into a report:
select the item in the left-hand list and then click the Add button next to it. That
column will now appear in the middle list and will be included in the output.

To remove a column from a report:
select it in the middle list and click on the Remove button to the left.

In the example below we show a report which prints a member's name in column one,
their membership number in the second, their number of the primary locker in the third
and any second locker they have in the fourth column. If you wish you may alter the
placing of the columns by clicking and dragging the fields in the middle window. The top
field will always be printed in column one, the next in column two, and so on. The data
will be sorted in order of the locker number. The DOB and Group ID fields will not be
printed because they have been specified as "Hidden" but they are still required as we will
explain later.
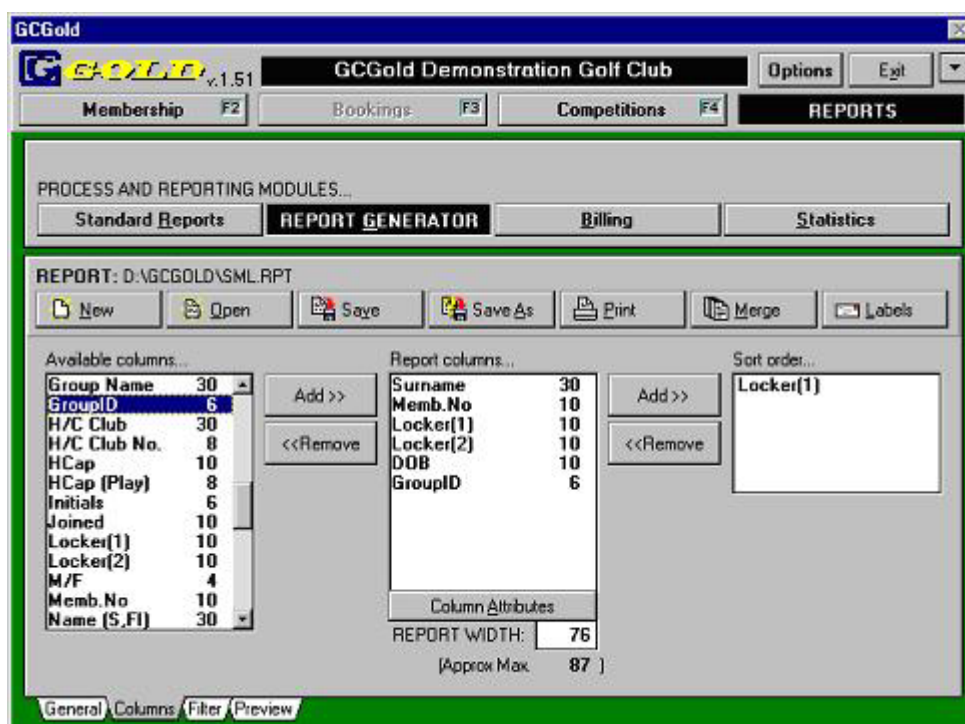
gcgold016.JPG

3.2.3 Step Three – Selecting the records to include using column filters
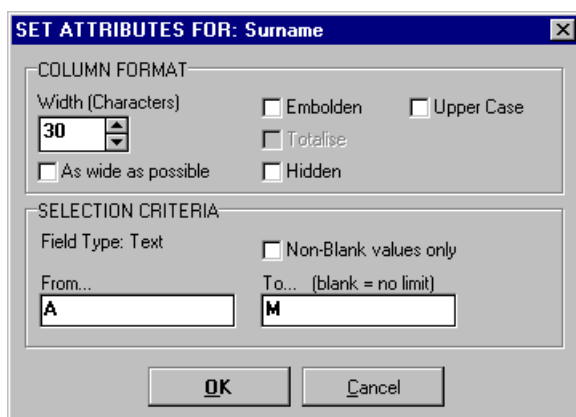
For each field, the [Column Attributes] button underneath the middle window allows you to specify the "search criteria" or ranges of values which determine what is included in the report.

To use this feature properly it is important to understand that the fields available within the Report Generator fall into one of four data types:

Data Type	Description	Columns such as :
TEXT	Any combination of letters or numbers	Name, Address, Tel. No.
NUMERIC	Numerical values only (no letters)	A/C Balance, Total Billed
DATE	Can only contain dates (Day:Month:Year)	DOB, Date of Joining
CODE	Can only contains valid GCGold Codes	Spec. Charges, GroupID

To refine your selection for output, select the column in the middle list with which you wish to be more specific so it appears surrounded by a blue border. Click on the Column Attributes button underneath this list and you will be presented with a "Set Attributes For" window. The options presented within this window will be determined by data type of the column.

A)   Set Attributes For Text Column (e.g. Surname)

The window is split into two sections;

Column Format
Select the width of the column to be printed (in characters), and whether the output should be in bold type, upper case or hidden (the latter is used when you wish to filter the report output using this column and, therefore, have to include it but do not wish to print the contents of this column in the final print out).

Selection Criteria
Here you may select to specify a text range to include in the output. In our example the Surnames we want start between A to M, and so typing the letter A in the "From.." box and the letter M in the "To..." box will restrict the report output to members whose surname starts between A and M.

B)   Set Attributes For Numerical Column (e.g. Locker Number)

SET ATTRIBUTES FOR: Locker(1)

COLUMN FORMAT

Width (Characters) ☐ Embolden   ☐ Upper Case
10   ☐ Totalise
☐ As wide as possible   ☐ Hidden

SELECTION CRITERIA

Field Type: Numeric   ☑ Non-Zero values only

From...   To...   (zero = no limit)
        0   0.00

[OK]   [Cancel]

Column Format
This is identical to that shown for a text column except that the Totalise option is now available. Selecting this option (by putting a click in the box) will add up all the items for this column and output a total figure. This would be rather meaningless in this situation and so we leave it blank.

Selection Criteria
Here, for example, we could select to include only locker numbers 1 to 25. In our requirement, however, we want all lockers to be included so we leave the right hand box showing zero (meaning no limit). However, we only want to know about members who have lockers and so clicking on the "Non-Zero values only" box will ensure that members with no locker are omitted from the report.

C)   Set Attributes For Date Column (e.g. Date of Birth)

SET ATTRIBUTES FOR: DOB

COLUMN FORMAT

Width (Characters) ☐ Embolden   ☐ Upper Case
10   ☐ Totalise
☐ As wide as possible   ☑ Hidden

SELECTION CRITERIA

Field Type: Date

From... ☐ No limit   To... ☐ No limit
16 Mar 63   16 Mar 73

[OK]   [Cancel]
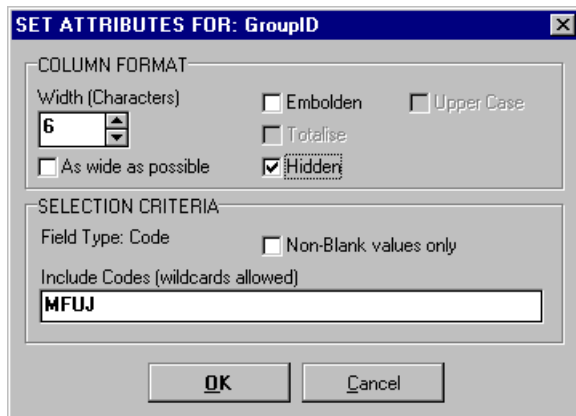
Column Format
We want to include members who are between 25 and 35 years of age and this field acts as our filter. However, we don't want to show their date of birth on our report. Clicking on the Hidden box will mean the ages are not printed on the final output.

Selection Criteria
The example above shows that we have set the date ranges to include members who were born within the required period.

D)   Set Attributes For Code Column (e.g. GroupID – Male Full Joint Members)

Column Format
We only wish to include MFUJ as our Membership Group code so that only Male Full Joint Members are included in the report., however, as with the date of birth, we can choose to hide this field.

Selection Criteria
Entering the Membership Group code for Male Full Joint Membership will mean that all other members will be ignored in the output.

For information on Membership Group Codes please refer to Section 6.6.

Once you have selected all the data you require in the report you may select how the information is ordered when it is printed out.

To sort the output:
select the column to be used in the middle list and then the Add button to the right.

Summary

We have now constructed a report which will print the lockers, membership number and surname for all male full joint members between the ages of 25 and 35. In addition, if present, the second locker number will be printed out (note that if we had also set the column attributes for this second locker to be "non-zero values only" then only members who had both lockers would be included). Although we have used the date of birth field as a filter and the Group Membership code field, these will not appear on our print-out.

Finally, in selecting the locker field as the sort field this prints out the results in order of the locker number.

3.2.4 Step Four – Imposing a overall Membership Filter

In addition to refining the output by selecting data ranges to include, you can impose a filter on the entire membership database which may make life easier. For example, if you wish to produce a report which solely concerns lady members you can de-select the Include Men option from this screen but leave the Include Ladies option. Any report produced will be based on lady members only. This is easier than using the Column Attributes feature to select to include just the ladies membership group codes.

Filter by Membership Details
You may filter the Membership database to be used in the report using the Filter tab at the bottom of the window. This opens up the same Members' Filter screen used in the Membership Module described in detail in section 1.1.3. Use this filter to specify the members on whom you wish to perform the report by selecting the gender to include, the age group and specific playing categories.

Filter by Transaction Date Range
If you are producing a report which includes financial transaction data you can set a range of dates between which transactions will be included. Any transactions outside of this date range will be ignored and will not appear in the report.

We don't need the use any of these facilities in our example but the Filter page will often provide a simple means of selecting records to include.

3.2.5 Step Five – Previewing a Report

At any stage of the report's construction you can click on the preview tab at the bottom of the page to see a preview of how the report would appear if you sent it to the printer.

Please Note: A preview will only be displayed if the columns you have included and the filter options and column attributes you have selected would actually produce printable data. If no output is generated then the following message will appear.

If this happens, check the configuration of the report in the filter page and the "attribute" of each included column to make sure you are not screening out the data you actually wish to produce. For example you can not produce a report on the membership fees received for all full lady members if you have the Men box clicked in the filter window rather than the Ladies.

If the screen appears blank click on the Zoom Out button to decrease the magnification of the preview.

3.3 Mail-Merging with Other Word Processors

The **Merge** button allows you to create a text file which you can import into any other standard Windows word processor to create large numbers of personalised mail-merge covering letters in one simple operation. We will be happy to assist if we can on using this feature with any one specific third party word processor.

3.4 Printing Address Labels

Clicking on this button prints out address labels for all members included in a report.

MODULE OVERVIEW

Section Four

The Reports Module

BILLING

Section 4

Overview of The Billing Module
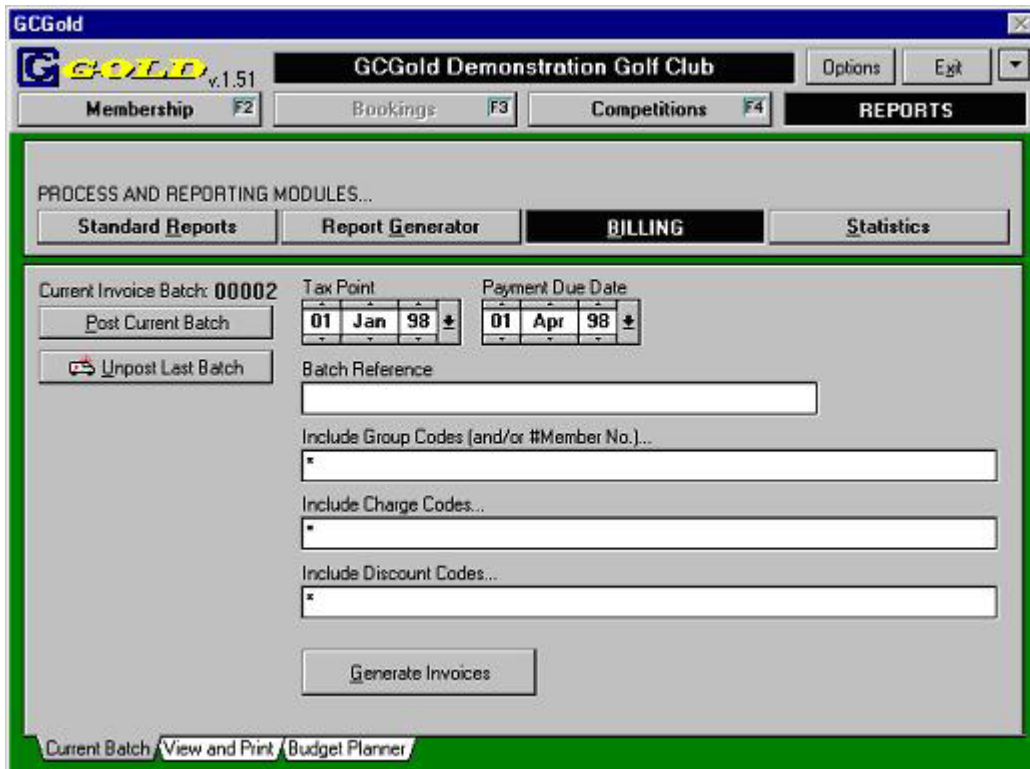
gcgold017.JPG

The GCGold Billing module provides an easy, flexible, yet powerful range of tools for producing all your bills.

In general, the success and efficiency of the billing system depends upon with the way you have structured your membership, charge and discount codes. If done correctly then the task of producing all your bills and the subsequent financial and statistical reports is reduced to a few clicks of the mouse.

This section assumes that you have read Section 6 and have an understanding of the principles in using structured codes. If you have any questions on this matter or require any further explanation please do not hesitate to call MH Systems Ltd.

Section 4.1: Creating Bills

GCGold provides a mechanism whereby you can generate your invoices for a billing period of your choice, from a tax point of your choice and just include the prices and members you require. Once generated, you may preview the batch to check the details in full prior to posting and printing.

Before any bills are generated you must first check that the Year Start Date indicator in the first page of the Options Administration set-up module is correct. Use the arrows above and below the indicator to set the date to the beginning of your current financial year.

For instructions on how to create and print a batch of invoices please follow the steps shown on the screen in green ink. We have provided an example to help you.

4.1.1 Step One – Specifying the Bills to be included in the batch

EXAMPLE

As an example we will create a batch of invoices for payment by the 1st April for all our male full members, male and female joint members (but not full lady members). We will invoice them for the membership fees and locker fees but nothing else.

gcgold018.JPG

4.1.2 Tax Point and Payment Due Date

First you should set your Tax Point (the date of the bills to be generated). The default will be today's date but you may change this if you wish. Secondly, select the date for which payment is due. Use the arrows above and below the indicators to set the correct dates.

NOTE: If you see the following error message, check your Year Start Date in the Options – Administration - General set-up module (Section 6.1). GCGold will not generate invoices if the Tax Point is set more than one year after the Year Start Date.

4.1.3 Batch Reference

Type in a phrase in the white box. This will be used to identify the batch at a later date.

4.1.4 Include Group Code

Here you may select the members whom you wish to include in the batch in a number of ways;

By Membership Number	Delete the asterisk and insert a hash (#) and the membership number. The batch will only include bills for that member.
By Group Code	Delete the asterisk and insert a membership group code. This batch will then only include bills applying to members within that group code.
By Multiple Selections	You can enter several membership numbers or group codes to be included in the batch. Delete the asterisk and enter the required numbers and codes separated by a comma. The batch will then include bills for the combination specified.
Exclude Option	You can elect to exclude certain individuals or groups by including their membership number or the code in this windows but put a minus sign as a prefix.

In our example we wish to include full male members, full male joint members and full lady joint members only. Hence, we delete the default wildcard (*) and add the specific group codes we require into this window separated by a comma as shown above. If we wished, however, we could use our own wildcard to shorten our example to MFU*,LFUJ. For more information about using wildcards and group codes please refer to Appendix A.

4.1.5 Include Charge Codes
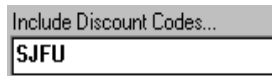
Include Charge Codes...
SMFU,SLFU,FLCK1,FLCK2

The same procedure is used for specifying the price codes you wish to include on the invoices. In our example we wish to include the fees for male full members, joint male and lady members and the two locker fees. The default wildcard (*) is deleted and the specific appropriate codes are placed in the above box separated by a comma.

Note: We could make use of our own wildcard by combining the two locker fee codes FLCK* as these are the only two codes with these four letters in common. However, we could **not** shorten the membership fee codes to their common letter and a wildcard (i.e. S*) because other codes such as SMCD (Annual Fee Cadet) and SM5D (Annual Fee 5 day) use the same common letter and would, therefore, also be included.

4.1.6 Include Discount Code
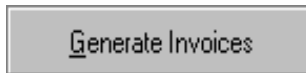
Include Discount Codes...
SJFU

The same procedure is used for specifying the discounts you wish to include on the invoices. In our example we need to include the discount code for joint membership. As no other discounts are required we simply delete the default wildcard and enter this code into the box.

4.1.7 Generating a Temporary Batch for Previewing

Once you have selected the tax point, payment due date, the members to bill and the items to include, you can generate your bills by clicking on the Generate Invoice button.

Generate Invoices

Note: In many cases clubs simply wish to generate all their invoices for all price items for all members in one operation. To do this simply specify the tax point and payment due-date, leave the default asterisks in the boxes and click on the Generate Invoices button.

Section 4.2: Previewing, Posting and Printing Bills

4.2.1 Step Two – Previewing and changing batch prior to Posting

Once you have generated your batch click on the ⎰View and Print⎱ tab at the bottom of the screen.

gcgold019.JPG

You will see a summary of the batch details including the batch number, the tax point (date of invoice), the description, the total value, the total value of all discounts and the VAT. To see a more detailed breakdown, double click on the batch in the window and it will expand downwards to show you a summary of all the bills included in the batch.

For a detailed view of a specific bill, double click on the bill within the list.

If you wish to change the contents of a batch, return to the "Current Batch" page and alter the dates, change the group, charge or discount codes and recreate your batch using the Generate Invoice button until you are satisfied. Each time you do this it overwrites the last "unposted" batch and so this process can be repeated as many times as you wish until you are happy.

4.2.2 Step Three - Posting Bills

Once you are happy with a batch, post it into the system using the ⎰Post Current Batch⎱ button on the Current Batch page.

4.2.3 Step Four - Printing Bills

You can select to print all the bills in the posted batch in one operation or select groups of individual invoices from within a batch.

A) To print out all bills
click once on the Batch item in the list within the View and Print page.

B) To print a block of consecutive bills click on the top bill, hold the shift key down and click on the bottom one. These, and all the bills in between, will be selected. Click on the Print Bills button.   The next Invoice Print Setup window will display these specific bills in the "select to print" window.
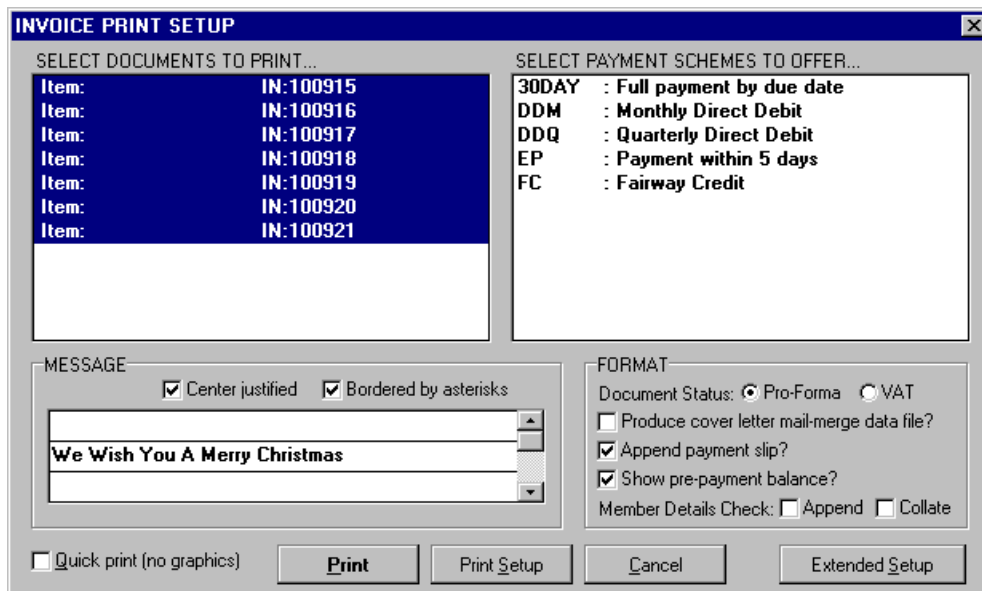
C) To print several specific bills
hold the CTRL key down and click on all the bills you wish to print.   Each one will be highlighted in blue.   Click on the Print Bills button.   The next Invoice Print Setup window will display these specific bills in the "select to print" window.

Once you have selected the required bills click on the [Print Bills] button.

4.2.4 Step Five - Invoice Printing Set-up

Clicking on the [Print Bills] button opens the Invoice Print Setup window.

This final window provides a number of features such as offering Payment Schemes, adding messages to invoices, adding payment slips and member details.

The bills you have selected to print will be displayed in the top left hand box on the screen

A) Offering Payment Schemes

The top right hand section will display a list of payment schemes which are available. These schemes are set-up in the Options – Administration module (for more information on Payment Schemes please refer to Section 6.4). Choose which scheme you wish to make available on the invoices within this batch by clicking on it with the left mouse button so it is highlighted in blue. It will then be printed on the invoice as an option along with a summary of any effects on the total invoice value and the date of the first payment should the option be taken.

B) Including Messages on Invoices

The bottom right of the screen allows you to enter a message which will be printed under the last item of each bill selected to print. The boxes above allow you to select whether to justify the message text in the centre of the page or to the left margin and border the message with asterisks.

C) Other Printing Options

GCGold allows you to choose how your bills will appear and to include certain additional elements within the printouts.

The bottom right section shows seven boxes which, when selected, have the following effect:

Pro-Forma	Prints **"This is not a VAT invoice"** on the bill
VAT	Excludes the above phrase from the printouts.
Cover-Letter	Allows you to produce a mail-merge file.
Append Payment Slip	Adds a payment slip at the bottom of the invoice
Show Pre-Payment balance	Displays the pre-payment balance on the invoice
Members Details *Append*	Prints all the bills first then the members details
Collate	Prints a member's details and then their details sheet
Extended Setup	Allows you to specify the titles which will be added to Pro-Forma and VAT invoices and credit notes.

4.2.5 Step Six - Printing Labels   Print Labels

This button prints out address labels for all the members included in the batch print-out. GCGold will automatically include all the correct information and print the labels in the format you have specified in the Options - Set-up Labels window described in Section 5.2.

MODULE OVERVIEW

Section Five

Options - Golfing Setup

Section 5

Configuring the Program

Using the [Options] button in the top right corner of the screen opens the GCGold User Option window shown below. In addition to some general set-up options such as printers, labels and the background colour, this screen provides access to the golf and administration setup modules (see section six for administration setup).

```
GCGold - USER OPTIONS                                    [X]

☑ Show Help Hints        ┌Auto-Backup─┐   ┌Preload Modules...─┐
                         │ ☐ On Start │   │ ☐ Members         │
🔲 Select Background Color│ ☐ On Close │   │ ☐ Bookings        │
                         └────────────┘   │ ☐ Competitions    │
🖨 Setup Printer                          │ ☐ Reports         │
                                          └───────────────────┘
📇 Setup Labels


┌Go to...──────────────────────────────────────────────┐
│                                                        │
│   [    Golf Setup (F11)   ]   [  Administration (F12) ]│
│                                                        │
└────────────────────────────────────────────────────────┘
[  Backup  ]        [    OK    ]        [  Cancel  ]
```
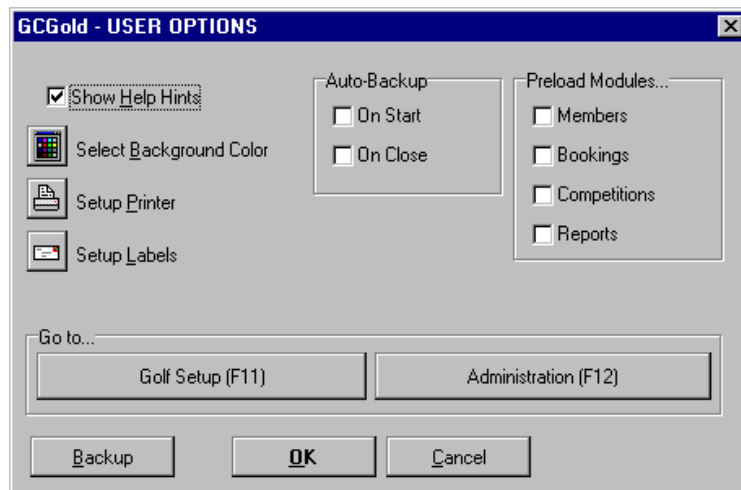
Section 5.1 – General Set-up Options

☑ Show Help Hints

If you have a tick in this box and rest the mouse on an area of the screen, small help hints appear after a few seconds. Remove the click to hide these messages

🔲 Select Background Color

Opens the Windows Colour Palette allowing you to change the background colour of GCGold

🖨 Setup Printer

Opens the standard default Windows Printer Selection screen. For more information on this, please refer to your Microsoft Windows manual.

📇 Setup Labels

Please refer to the next section on "Configuring Labels".

┌Auto-Backup──────┐
│ ☐ On Start   │
│ ☑ On Close   │
│   │
└─────────────────┘

You can select for GCGold to make a back-up automatically when you either start or close the software.

Section 5.2 – Setting Up Labels

gcgold020.JPG
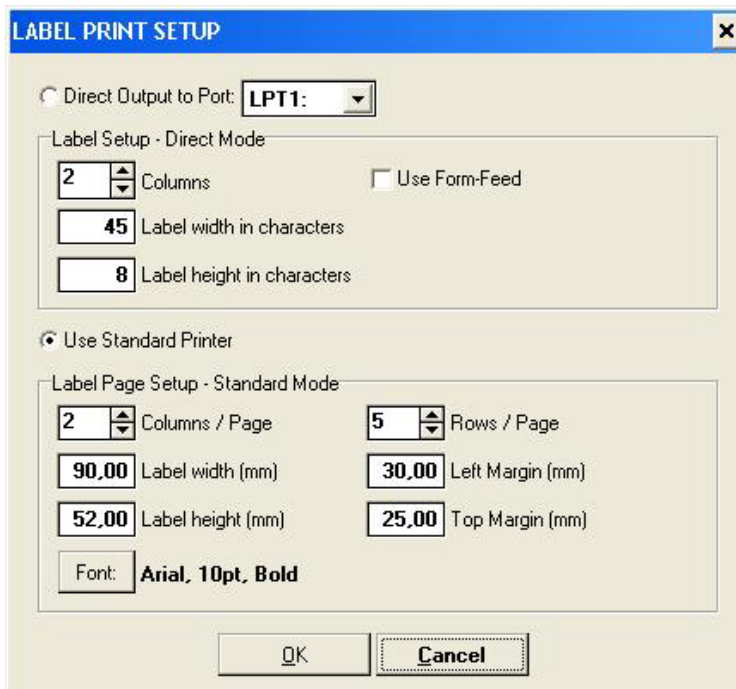
Click on the Set-up Labels button on the first screen of the Options module (see previous page).

In most cases you will not require the top option (Direct Output to Port) as this is only used when you have a specially designed and dedicated label printer. If you are using a standard printer such as a laser printer, bubble jet or ink jet then the bottom option "Use Standard Printer" is the correct selection.
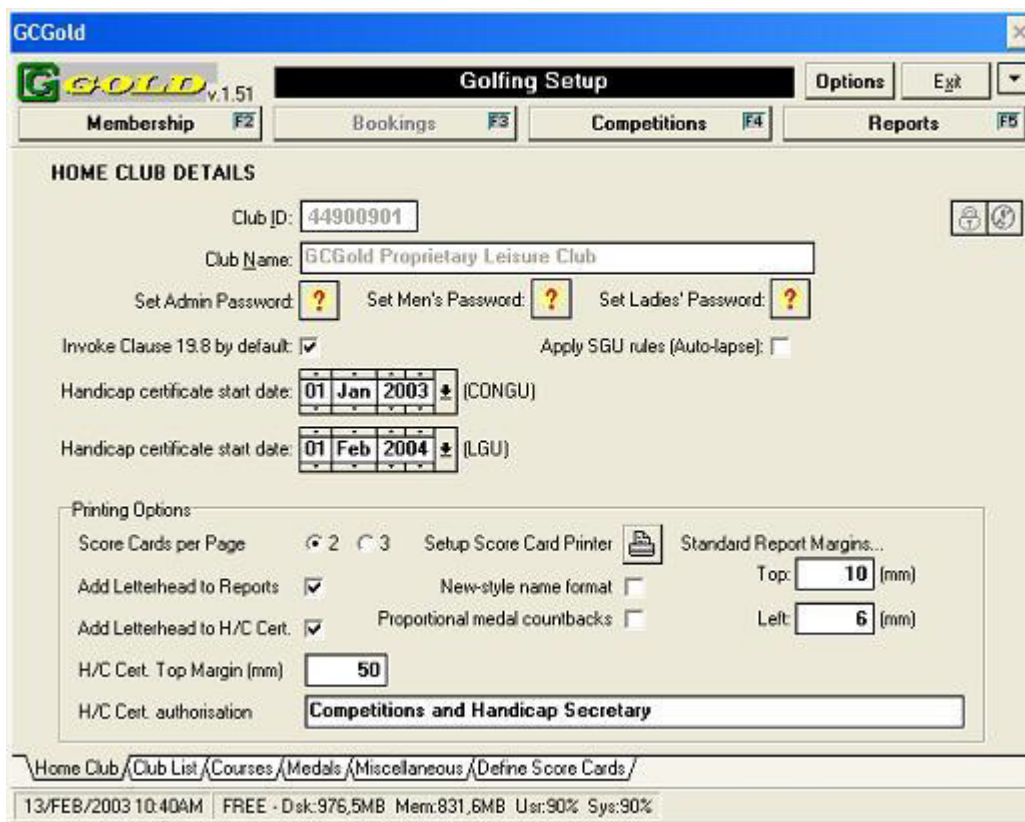
If you are using a dedicated label printer please call us for more information on using GCGold with such a device.

Using a Standard Printer

Select the lower of the two options on the left of the screen. Use the boxes in the Label Page Setup area to select the number of rows and columns on each label sheet and the margins for each label within which the information will be printed. Enter the distance, in millimetres, from the edges of the labels where you want the information to start and finish printing.

Section 5.3 – Golfing Set-up - Home Club Details Page

Click on the [Golf Setup (F11)] button in the Option screen to open the Golf Set-up Module.

gcgold021.JPG

The first page of the Golf Set-up Module displays some information about your home club and also allows you to configure some basic options.

A) Club Id and Name	Shows your clubs identity number (Club_id) and the name under which MH Systems Ltd has registered your GCGold
B) Passwords	Sets passwords to prevent unauthorised access.
C) Invoke Clause 19.8, Apply SGU	Click to enable these features
D) Handicap certificate start date	Use the two date indicators to set the start date for the CONGU and LGU handicap certification feature within the Membership module. These dates will determine the start dates for your handicap records and certificates.
E) Printing Options	Allows you to select to print two or three Score Cards per page and whether to automatically add a letterhead to any reports you print out. The letterhead facility, if required, must be set-up by MH Systems Ltd. support engineers.

Section 5.4 – Club List Page
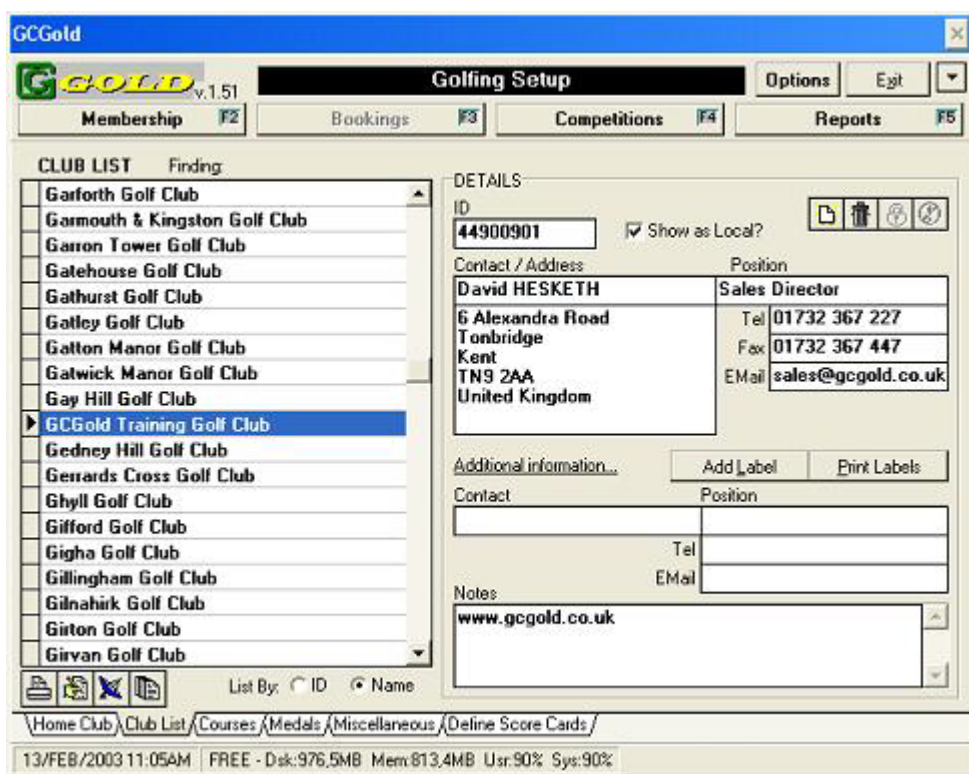
gcgold022.JPG

On the left of the screen is a list of all the clubs stored in the GCGold database. You can use the up and down arrow keys to get to the record you require or click with the left hand mouse button on the scroll bars to move through the list. The current selected club is shown with a black triangle to the left of the list and the details of that club are displayed in the right hand portion of the Window.

List By: ID - The clubs are listed in order of Club Identifier number.
Name - List the clubs in alphabetical order.

5.4.1 Details of Other Clubs

GCGold includes a list of all the clubs in the country. Although this list is regularly maintained we cannot guarantee the total accuracy of the information at any one time as club details may change in between updates..

Select a club from the list. Its details are displayed on the right.

ID

Every club in the country is allocated it's own unique numerical identifier composed of eight numbers. These numbers contain three bits of information in the following format. The first two numbers specify the country, the second three the area within that country and the final three the number of the club within that area. For example 44087023 will be a club in England (44), region 087 and with a club number of 023.

Show as Local ?
Allows you to select whether a club is included in the database group "Local Clubs". This feature is used as a filter when using the Membership Module allowing you to view just the members of your local clubs. Usually, only those clubs which share the same area code (see ID) will be specified as local. If, however, there is a club in another region with which you have particular connections you can also set this club to be "local" to your own.

Club and Contact Details
Shows the address and telephone details of the club and the name of the contact.

Additional Information
Allows you to add details of a second contact and any other notes you wish to make.

5.4.2 Building and printing a list of address labels for Other Clubs

GCGold allows you to build a list of club address labels which you can then print out if you wish to send out a letter.

[Add Label] Adds the selected club and contact to a list of labels within the club list.

[Print Labels] Displays the compiled list and then prints the labels.

Note: The named Club List is maintained by MHS Ltd. In this way we can guarantee that your list will be identical to that used by everyone else. If you wish us to add or delete a club then you simply need to ring us up, tell us the details and we will update your system within a matter of minutes.

Section 5.5 – Courses Page

Before you can run any competitions on your system you must first create and configure your courses. This will allow us to automate much of the procedure of holding a competition such as the calculation of a competition scratch score and any resultant handicap changes.

GCGold
Golfing Setup | Options | Exit
Membership F2 | Bookings F3 | Competitions F4 | Reports F5

COURSE DETAILS FOR CLUB:
GCGold Demonstration Golf Club

Courses:
- A Standard Course
- B Practice Course

COURSE-SPECIFIC DETAILS

First Tee-Off: 12:00am Last Tee-Off: 12:00am Normal Tee-Off Time: [ ] (min.) ☑ Eligble for Course Bookings

Course Timings (min) / Groups on hole

Hole	1	2	3	4	5	6	7	8	9	Out	10	11	12	13	14	15	16	17	18	In	Total
Time																					
Groups																					

TEE-SPECIFIC DETAILS

Tees: Blue   Copy Blue to All   Slope Factor: [ ]   Standard Scratch Score (SSS): 72

Hole	1	2	3	4	5	6	7	8	9	Out	10	11	12	13	14	15	16	17	18	In	Total
Par	4	3	4	4	3	4	4	5	4	35	4	4	3	4	5	4	3	4	5	36	71
Stroke	8	12	11	9	1	6	17	5	15		18	13	2	14	4	10	7	16	3		
Yards	410	326	430	398	145	357	410	544	287	3307	432	376	320	420	523	405	260	421	512	3669	6976

\Home Club \Club List \Courses \Medals \Miscellaneous \Define Score Cards /

gcgold023.JPG

This page allows you to set-up the courses for your own, and any other club. To set-up your own courses select your club from the list within the previous "Club List" page. You should see your club name displayed in the top right hand corner of the screen.

How to Set-up a New Course

5.5.1 Step One – Adding, Editing and Deleting Courses

To add a new course, first click the [ ] Insert New button on the toolbar. The cursor will now be flashing in the left in the smaller of the two boxes underneath the word 'Courses' next to the asterisk. Enter a Short Code for the course (allowing us to place them in an order). Click on the longer box immediately to the right and enter the name of the course.

To edit an existing course make any changes you wish to the data and click on [ ] the padlock button to save.

To delete a course click on the name in the window at the top and click on [ ].

5.5.2 Step Two – Specifying the Course Timings

Tee-Off Times:
Use the time indicators to specify the first and last Tee-Off times for that course

Normal Tee-Off Times:
Click on this box with the left mouse button and enter the time allowed for Teeing Off.

Course Timings (min)
Click on the first box to the left and enter the minimum time required for that hole. Pressing the Tab key moves you to the next box on the right. Enter the minimum times for the other holes.

5.5.3 Step Three - Specifying Pars, Strokes and the Scratch Score

Use the Tees List Box directly underneath the section heading to set the course to Blue. Click on the box immediately to the right of the word Par. Enter the Par for that hole (Hole 1). Using the Tab key, move along the list filling in the par values for the other holes.

Assuming the par values are the same whatever the tee placements, you can now copy those values to all the others by clicking on the "Copy Blue to All" button. If some are different you may select the different tee in the list and amend any of the Par figures for the other tees.

Now select each of your tee placements in turn (blue, white, yellow then red) using the list box as described above and enter the stroke and yardage values (in each case using the Tab key to move along the row).

Finally, click on the data box to the left of the words "Standard Scratch Score" and enter the correct value.

Having specified all the required information you can now use the "Post edits" or "Cancel edits" button on the toolbar.

Once created, a course will appear in the Round Set-up window when you create a new competition.

Section 5.6 - Medals Page

gcgold024.JPG
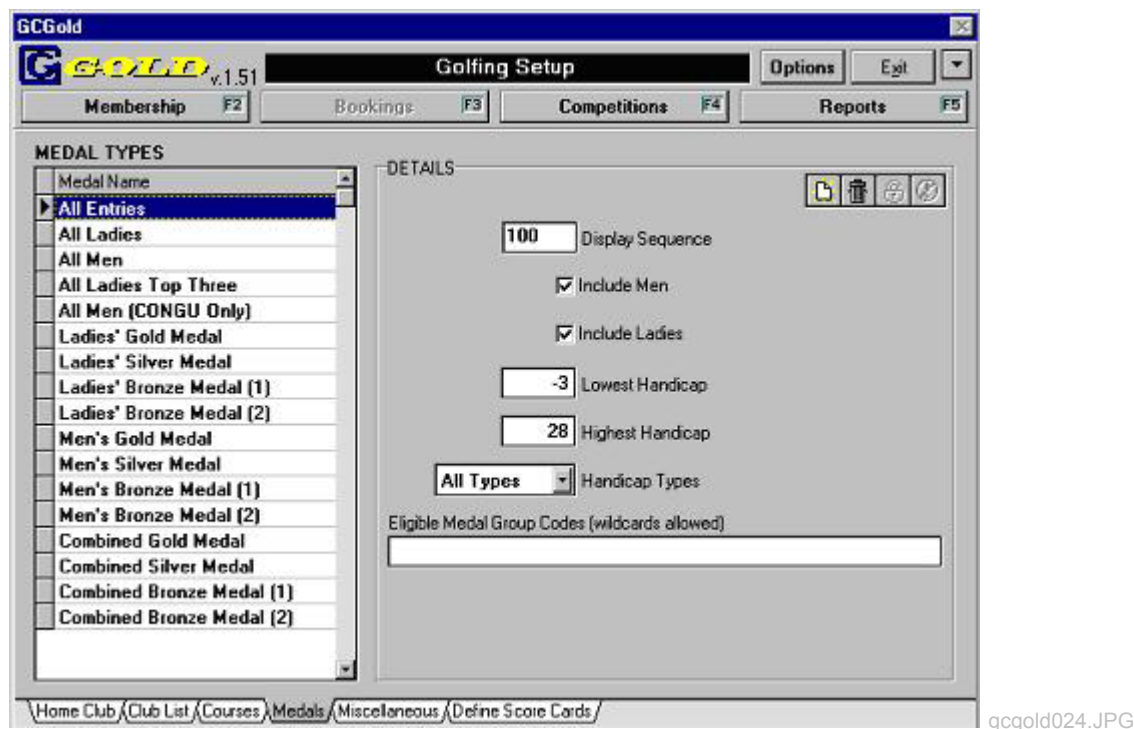
GCGold already contains a number of standard medal types and these can be seen listed on the left hand side of the screen. You can use these as they are, edit them or delete them and create your own. These medals are used in the Results page of a competition and are used to allow you to print out the competition results for specific medal groups or divisions.

Creating or editing a Medal

Click on the Insert Record button in the toolbar. You will see a blank box appearing in the list on the left with an asterisk next to it. Type the name of the medal into this box. Edit the information on the right of the screen to set the parameters for that medal.

Display sequence	sets where the medal appears in the list; the higher the number the lower down the list it appears. The All Entries medal must be top and so all other numbers must be above 100.
Include Men/Ladies	dictates whether the medal includes men, women or both.
Lowest/Highest Handicap	allows you to set the handicap limits for the medal.
Handicap Types	allows you to specify which handicap types may be included.
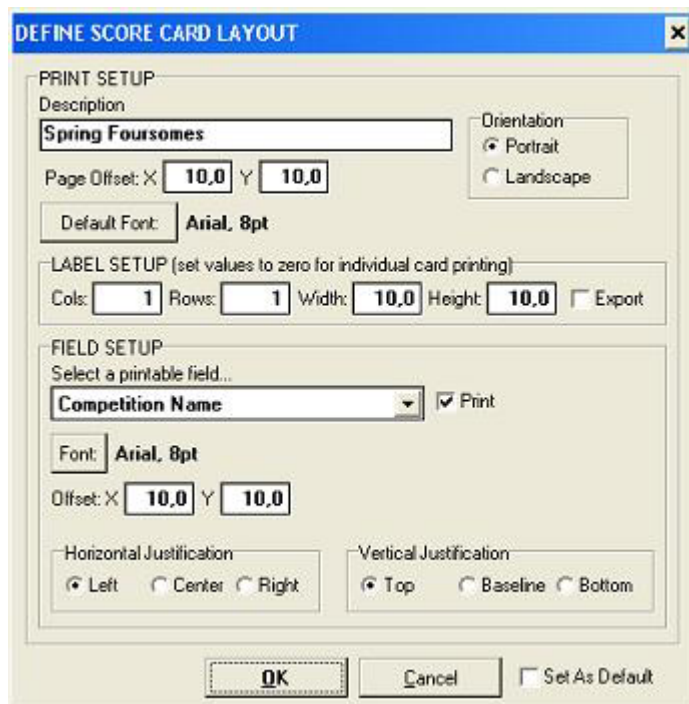
You can add a multiple medal group by adding other medal codes into the "Eligible Medal Group Codes" box at the bottom. Medallists within all these other codes will be included in the print out.

To edit an existing medal, select it in the list on the left, make the required alterations and click on the Post edit button.

Section 5.7 - Define Score Cards

GCGold allows you to create your own score cards or range of score cards. Initially the list in the Define Score Card page will be blank but you will see three buttons to the left which allow you to create a new card and edit or delete an existing one.

Creating or editing a Score Card

gcgold025.JPG

Print Setup
Enter a description for the card in the top box. This name will be used to identify the card when you want to select which score card type to print off for a competition. Select the orientation of the card and enter the X and Y measurements (in millimetres) by which printing will be offset on the page. You may also select the font which will be used by clicking on the Default Font button.

Label Setup
Enter the number of Columns, Rows, Width and Height measurements (in millimetres) of the labels. If you need to export the labels to a third party Windows program, tick the Export box. Note: you can set values to zero for individual card printing.

Field Printing Parameters
The "Select a printable field" box contains a list of all the information which you can include on the score card. Click on the box to drop down the list and select the field you require. All the options below will now apply to that field. Click on the Print box to the right and if you wish to select a different font for a specific field click on the "Font" button underneath.

To position the field selected in the list box, use the X and Y co-ordinates to enter a measurement (in millimetres) by which to offset the first character from the left and top of the page. Alternatively you may use the Vertical and Horizontal justification buttons rather than the X and Y offset features if this is appropriate.

Some fields contain incremental information such as the Strokes for a player. If you select one of these fields a second set of X and Y co-ordinates appear to the right allowing you to set the distance between each value.
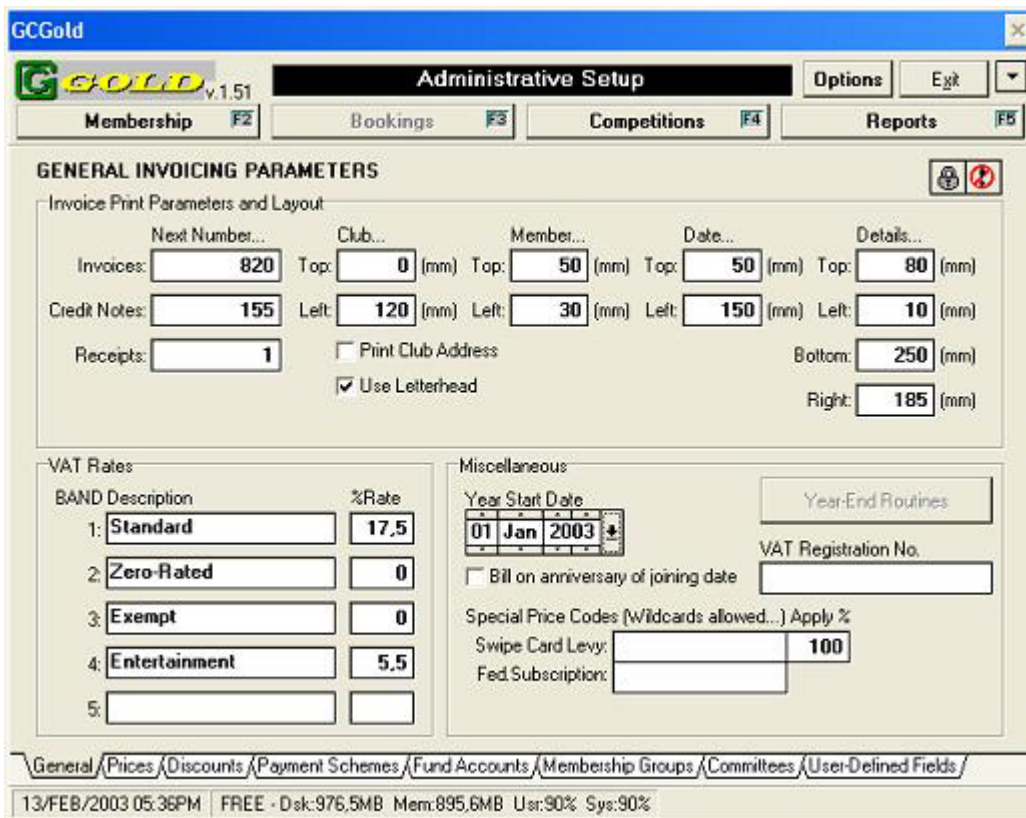
MODULE OVERVIEW

Section Six

Options - Administration Setup

Section 6.1 – General Administration Setup

Click on [Administration (F12)] in the Option screen to open the Administration Set-up.

gcgold026.JPG

The first page of the administration set-up allows you to configure a number of basic options.

6.1.1 Invoice Print Parameters and Layout:

The top part of the screen uses a combination of data boxes and check boxes to allow you to set-up how your invoices will appear when printed.

Next Number:	Allows you to specify the next invoice, credit and receipt number that will be allocated when the next batch is printed out.
Club, Member, Date:	Enter the number of millimetres from the top of the page and from the left margin where you would like this information to be printed.
Details:	Specifies where printing should start and also the distances from the bottom and right margins where printing should stop and a new page commence.
Print Club Address:	Check this box to print the client's address on the output.
Use Letterhead:	If you have asked MHS to generate a letterhead for you, checking this option will automatically print your letterhead on output.

6.1.2 VAT Rates

Use the data boxes in the lower left of the screen to set-up the VAT rates you require. To enter a new rate simply click on a free box (5 are provided), enter the name of the rate and then the actual rate in the box to the right. To edit an existing rate simply click on the information to be changed and edit the entry.

6.1.3 Year Start Date

Use the date indicator to set-up the Year Start Date for your club using the time indicator.

Please Note: When you generate your invoices in the Reports – Billing module you are able to specify a Tax Point (date-of-invoice generation). GCGold will only allow you to generate invoices if the Tax Point is specified as being within one calendar year of the Year Start Date. If it is not, an error is reported.

Bill on anniversary of joining date:
> Only to be used with MH Systems Tech Support help, unless it has been set-up by our engineers.

VAT Registration No. :
> The golf club's VAT Code that appears on invoices. Needs to be filled.

Special Prices Code:
> This field includes the three following fields.

> Swipe Card Levy :
>> In this field should be any price codes that have been assigned to a levy, e.g. SWLEVY –swipe card levy

> Apply % :
>> The percentage of the levy you wish to apply.

> Fed. Subscription:
>> Only to be used with MH Systems Tech Support help, unless it has been set-up by our engineers.

Section 6.2 – Price Codes

gcgold027.JPG

For information on structuring and using codes please refer to Appendix A.

6.2.1 Step 1 - Creating a New Price Code

To set-up a new Price Code click on the New Record button in the toolbar. A blank blue box will appear in the top right of the screen marked with an asterisk. Click on this box with the mouse and enter the code you want to use. Use the Tab key on your keyboard to move to the Invoice Description data box (or click on it with your mouse). You may now enter the description of that Price Code.

6.2.2 Step 2 – Configuring a Price Code

A) Price Type:

Select from the three types of Price in the list box

B) Payment Frequency

Use the list box beneath to select the appropriate payment frequency period.

C) Itemised...

Click on this box if you wish all items to be added together on any invoice into a total figure.

D) Temporary or Deferred Price Codes

Effective Until...
If you wish to set-up a temporary Price Code, use this date indicator to set the point at which the Price Code is no longer required. The example above shows a code which will become effective **from** the 13th of February 2003.

Deferred Until...
Although you may wish to create and use a Price code for a billing period you may wish to defer payment until a later date. Use the date indicator to set the deferral date. The example above shows a code which will be effective **until** the 13th of February 2003.

E) Analysis and Nominal Ledger Codes

GCGold allows you to enter up to three user-defined Analysis Codes as well as the Nominal Ledger code you wish to attach to a Price Code. These can then be used for including groups of prices, discounts and payment schemes in reports without having to enter each specific code.

6.2.3 Step 3 – Setting the effective date for a new or revised code

To define a Price Code, click on the new item button on the lower of the two toolbars. You will see that today's date is automatically entered under the Revision list box (providing a record of when the revision was made).

Effective from..

When you set a new value for a code, the date indicator will automatically show today's date so the revision becomes effective immediately. You may, however, change the date from which the new value is to take effect.

6.2.4 Step 4 - Specifying the actual value

Click the mouse on the button to display the Price Specification Window. What you see now is determined by the option selected in the Price Type button described above.

A) Fixed Price:

Set the VAT Rate using the list box at the top. The check box to the right selects whether the Price entered below includes or excludes VAT. Enter the Price in the Fixed Price box below the VAT list box and use the check box to indicate if the payment is to occur at the start of the period.

B) Variable Monthly Price:
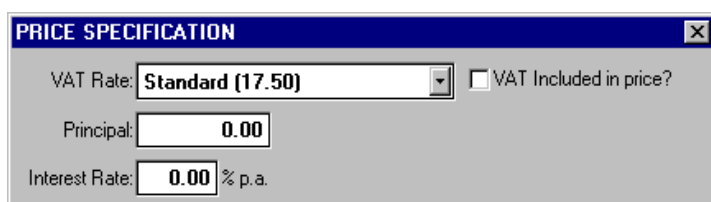
Set the VAT Rate using the list box at the top. The check box to the right selects whether the Price entered below includes or excludes VAT. Enter the individual amounts of the Price to be paid on a monthly basis. These will then automatically appear on the member's invoice in the way specified.

C) Loan Interest Repayment:

Set the VAT rate using the list box at the top. The check box to the right selects whether the Price entered below includes or excludes VAT. Enter the principal amount in the Principal box and the interest rate beneath. Click on the OK button to return to the main page.

D) Comments

Use this box to enter any notes you wish to be associated with this Price allocation. Once you have set your values click on the OK button. Use the lower Padlock of the two toolbars to post these details into your database.

6.2.5 - Changing the Value of an existing code

Select the Price Code to be revised from the list in the left portion of the screen. Click on the Insert Record button on the lower of the two toolbars.

You may now repeat the process described above for assigning a value to a Price code but notice that a new revision date has been placed in the Revision list box allowing you to keep a record of all changes to the value of that code.

Once you have set your values, click on the OK button. Use the lower of the two toolbars to post these details into your database.

6.2.6 - Renaming a Price Code

Clicking on this button allows you to rename a Price Code without affecting its specification. All other items linked to this code (e.g. Membership group codes) will be updated by the system.

Section 6.3 – Discount Codes

gcgold028.JPG

6.3.1 Step 1 - Creating a New Discount Code

To set-up a new Discount Code click on the [icon] new record button in the toolbar. A blank blue box will appear in the top right of the screen marked with an asterisk. Click on this box with the mouse and enter the code you want to use. Use the Tab key on your keyboard to move to the Invoice Description data box (or click on it with your mouse). You may now enter a description of that Code which is how it will appear on an invoice.

6.3.2 Step 2 - Configuring a Discount Code

A) Itemised...   [☐ Itemised]

If this check box is selected all items to which this discount applies will be itemised on an invoice.

B) Temporary or Deferred Discounts

[☑ Effective Until... 13 Feb 2003]

Effective Until...

If you wish to set-up a temporary Discount Code use this date indicator to set the point after which the Discount Code will be excluded in invoice calculations. The example above shows a discount code which will be included on invoices **until** the 13th of February 2003.

Deferred Until...

If you wish to create and use a Discount code but wish the code to be excluded until a later date you can defer the discount using the date indicator. The example above shows a code which will be included on invoices **after** the 13th of February 2003.

C) Analysis and Nominal Ledger Codes

GCGold allows you to enter up to three user-defined Analysis Codes and a Nominal Ledger code. These can then be used for including groups of prices, discounts and payment schemes in reports without having to enter each specific code.

6.3.3 Step 3 – Setting the start date of a new code or revision

To define a Discount Code click on the new item button on the lower of the two toolbars. You will see that today's date is automatically entered under the Revision list box (providing a record of when the revision was made).

Effective from..

Initially the date indicator will show today's date so the revision becomes effective immediately. You may, however, change the date from which the new value is to take effect.

6.3.4 Step 4 – Specifying a discount value

Click the mouse on the Set Value button to reach the Discount Specification Window.

A) Qualifying Price Codes

If the discount value is only ever to be applied to a specific price list item then you must specify that Price code in the top window. If you do not then the discount will be applied to all price codes included in that invoice. In the above example, this discount will only be applied to price codes which begin with the letter S.

B) Turnover Accumulation

You can specify the criteria of the turnover accumulation upon which the discount is based.

Invoice Value: The discount is applied to the actual value on the invoice.

Rolling Turnover: The discount is applied to the overall turnover for the last period and the current period to-date added together. This period is set in the Accumulation span to the right of the screen.

Turnover Last Period: The discount is only applied to the turnover accumulated by the end of the last period.

Year-To-Date: The discount is applied to the turnover for the year-to-date.

C) Turnover Qualification Bands

Turnover Qualification Bands

Band	Turnover	Earned £	Earned %
1	100.00	5.00	0.00
2	250.00	10.00	0.00
3	500.00	0.00	10.00
4	0.00	0.00	0.00
5	0.00	0.00	0.00
6	0.00	0.00	0.00
7	0.00	0.00	0.00
8	0.00	0.00	0.00

☐ Apply highest band to total turnover

You may specify multiple discount bands using this feature. Specify the turnover threshold upon which your discount bands should apply and then enter either a value in the Earned £ column or a percentage by which to discount the turnover. The above example shows a three-tiered discount structure where the first £100 of turnover is discounted by £5, any turnover above that up to £250 is discounted by £10 and turnover between £250 and £500 will be discounted by 10%.

Comparison	No Discount	Discounted
First £100	£100	£95
Between £100 and £250	£150	£140
Between £250 and £500	£250	£225
Total Payable	£500	£460

You may, if you wish, elect to apply the highest discount rate to the entire turnover once the highest qualification band is reached. If the total turnover is £500 then, in the above example, the total payable would become £450 rather than £460. However, the box at the bottom is left unchecked and so the different bands would apply.

Please Note: If you wish to be generous, GCGold allows you to offer both an amount in Sterling and a percentage discount for any one qualifying band. HOWEVER the amount in Sterling will be taken off first, and the percentage discount taken off the remainder.

6.3.5 - Renaming a Discount Code

Clicking on this button allows you to rename a Discount Code without affecting its specification. Any relationships between this discount and other codes (i.e. if this discount has been added as a default to a membership code) will automatically be updated.

Section 6.4 – Payment Schemes

gcgold029.JPG

6.4.1 Step 1 – Creating a new Payment Scheme

To set-up a new scheme click on the new record button in the toolbar. A blank blue box will appear in the top right of the screen marked with an asterisk. Click on this box with the mouse and enter a code for the scheme you want to use. Use the Tab key on your keyboard to move to the Description data box (or click on it with your mouse). You may now enter a description of that scheme which is how it will appear on an invoice.

6.4.2 Step 2 - Configuring a Payment Scheme

A) Temporary or Deferred Schemes

Effective Until...

If you wish to set-up a temporary scheme use this date indicator to set the point after which the scheme will no longer be available. The example above shows a scheme which will be available **from** the 13th of February 2003.

Deferred Until...

If you wish to create and use a scheme but do not wish it to be available until a later date you can defer the date using the date indicator. The example above shows a scheme which will only become available **from** the 13th of February 2003.

B) Analysis and Nominal Ledger Codes

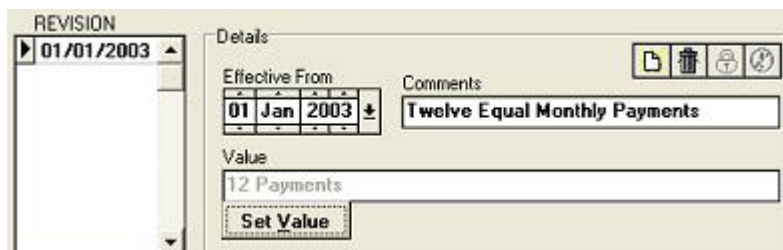GCGold allows you to enter up to three user-defined Analysis Codes as well as the Nominal Ledger code. These can then be used for including groups of prices, discounts and payment schemes in reports without having to enter each specific code.

6.4.3 Step 3 – Setting the start date for a new or revised scheme.

To define a Payment Scheme click on the new item button on the lower of the two toolbars. You will see that today's date is automatically entered under the Revision list box (providing a record of when the revision was made).
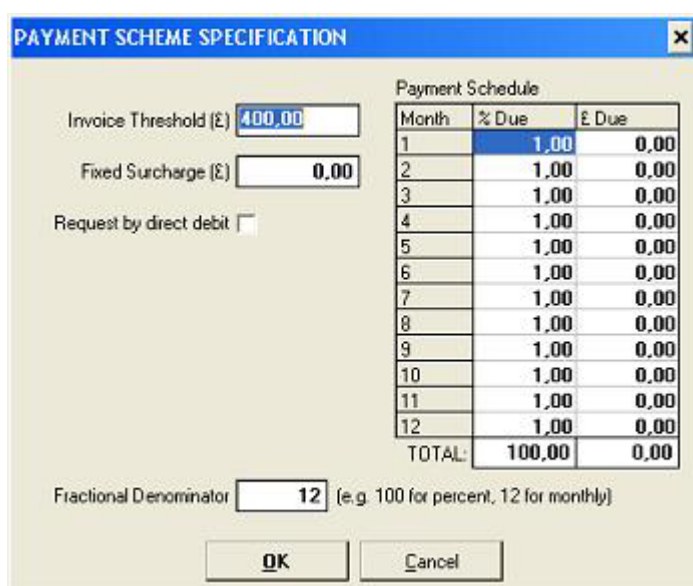
Effective from..
Initially the date indicator will show today's date so the revision becomes effective immediately. You may, however, change the date from which the new value is to take effect.

6.4.4 Step 4 – Setting the payment schedule.

Click the mouse on the button to reach the Specification Window.

Payment Scheme.JPG

A) Invoice Threshold

You may enter an invoice value which must be reached before this payment scheme can be offered. In the above example, the invoice value must be £400 or over before the scheme can be offered to the member.

B) Fixed Surcharge

If the additional charge for using the payment scheme is to be a fixed surcharge then enter the amount here. This amount will be added to the total and the extra payments spread across the period according to the payment schedule.

C) Direct Debits

If this box is checked, then all payments made under this scheme will be included within a report in the DD.Due column.

D) Setting the Payment Schedule

Allocating by percentage
If the payment breakdown can be specified by percentages then enter the percentage in the payment schedule list to the right of the screen. For example, if you wish payments to be spread over four equal quarters then enter the figure 25 to the right of month 1,4,7 and 10 to signify that 25% of the invoice total is payable on these months.

Allocating by Fractions
If the payment schedule does not lend itself to a percentage breakdown (for example twelve monthly payments of 8.333333 %) then you may use fractions. To specify twelve equal payments enter a fractional denominator of 12 in the bottom left of the screen and put a 1 for each month in the right hand table. The payment scheme will then indicate that one twelfth of the total is payable each month.

6.4.5 Renaming a Payment Scheme

Clicking on this button allows you to rename a Payment Scheme Code without affecting its specification. All relationships between this code and other codes (i.e. if this payment scheme has been added as the default to a members record) will automatically be updated.

Section 6.5 – Fund Accounts
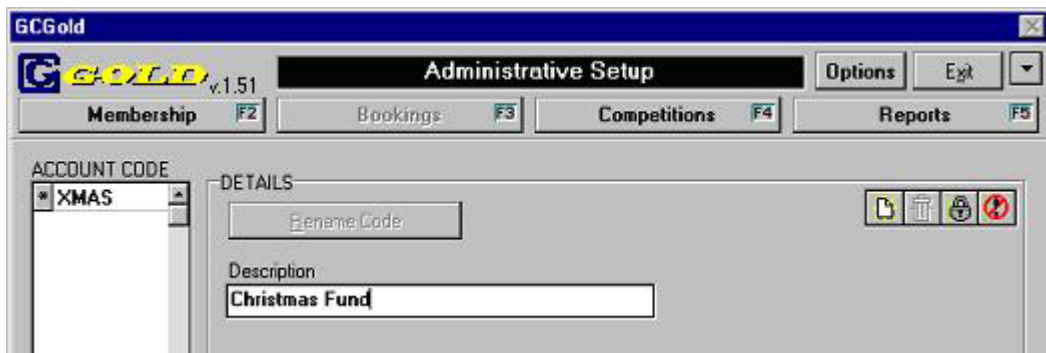
gcgold030.JPG

This allows you to create a specific code to allocate to payments made into any fund accounts.

Setting Up a New Fund

To set-up a new fund click on the [icon] new record button in the toolbar. A blank blue box will appear in the top right of the screen marked with an asterisk. Click on this box with the mouse and enter a code for the fund you want to use. Use the Tab key on your keyboard to move to the Description data box (or click on it with your mouse). This fund will now appear in the Members Account page if they wish to make a payment.

Section 6.6 – Membership Group Codes

gcgold031.JPG

Each member of your club should be allocated to a membership group. When performing operations such as invoicing, creating competitions or membership reports, adding a group code allows you to include large numbers of members in that operation in one go rather than having to add each member individually.

Group codes should be structured to allow you to include or exclude groups of members in any one operation using a form of shorthand rather than adding multiple codes. The shorthand technique employs a feature called "Wildcards" which are explained in Appendix A.

6.6.1 Step 1 – Creating a New Membership Group Code

To set-up a new Membership Group Code click on the [icon] new record button in the toolbar. A blank blue box will appear in the top right of the screen marked with an asterisk. Click on this box with the mouse and enter the code you want to use. Use the Tab key on your keyboard to move to the Description data box (or click on it with your mouse). You may now enter a description of that Code.

6.6.2 Step 2 - Configuring a Membership Group Code

M / F:	Select whether the code can apply to men (Male) only, ladies (Female) only or both.
Age:	Specify a lower and upper age range.
Default Discount Group:	Select the default discount group (i.e. Staff, Members).
Default First Year Levy:	Is a default fee for members in an assigned membership group to receive levy on invoice.

6.6.3 Step 3 – Adding default Fees and Discounts

This section of the screen is used to add and remove the default price list items and discounts (created in the previous pages and described in Sections 6.2 and 6.3). These fees and discounts will then be automatically added to the charges list for all members included in this group.

Click on the Add button.

The Price List initially shows the list of all price list items created which have been specified as periodic. Prices configured as On Demand (an example might be a joining fee) will not appear as you do not want them to be invoiced more than once. To add a default Price to a membership group code, simply select it with the mouse and click OK.

If you wish to add a discount to a membership group code click on "Show Discounts" at the top of the screen. The price list will be replaced by a discount list.

To delete a fee or discount select it in the Default Fees, Subscriptions and Discounts windows and click on the delete button.

Section 6.7 – Committees

gcgold031.JPG

This allows you to store any committee positions held by members of your club (or other clubs). This is often useful if you wish to send regular information sheets to committee members home addresses or to other officers within the committees of surrounding local clubs.

6.7.1 Step 1 - Creating a New Committee

To set-up a new Committee click on the uppermost of the three new record buttons. A blank blue box will appear in the top right of the screen marked with an asterisk. Click on this box with the mouse and enter the code you want to use. Use the Tab key on your keyboard to move to the Committee Name box (or click on it with your mouse). You may now enter a description of that Committee.

6.7.2 Step 2 - Setting Up a New Position within a Committee

First select the committee you require then click on the middle of the three new record buttons.   An additional box will be added in the Offices list allowing you to add an additional letter specifying the position within the committee. Use the Tab key on your keyboard to move to the Office title box (or click on it with your mouse). You may now enter a description of that Office.

6.7.3 Step 3 – Allocating a Member to a Committee Position

From your own club list..

Having created (or selected an existing) committee and office title with the mouse, click on the new button at the bottom of the screen.

Enter the date from which the position is to be held.

Clicking on the Set button reveals a list of your club members. Click on the member's name and they will appear in the Select a Member window and shown as holding this office from the date specified.

Specifying Offices at Other Clubs…

Click on the Set button and then the Filter button at the bottom of the member list. This allows you to select another club from the club list and the members of that club will then be displayed.

Section 6.8 – User Definable Fields
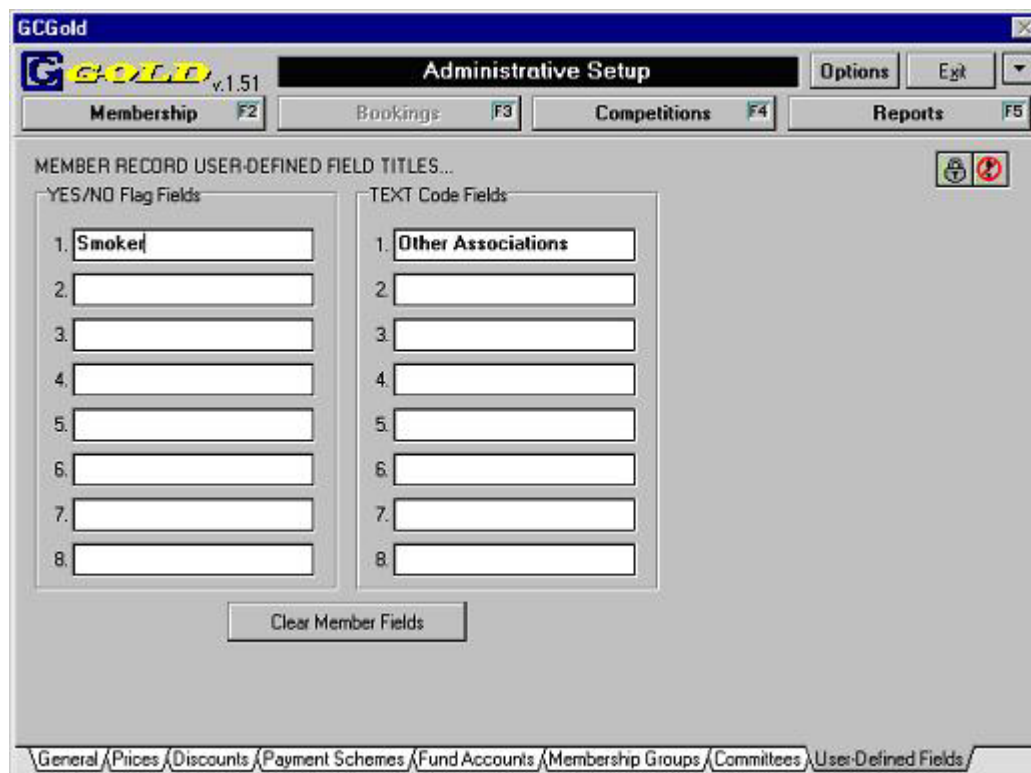
gcgold032.JPG

GCGold already contains, within its data fields, most of the information you will require on your members. In addition, however, we provide you with the means to specify your own tailored data fields which can then be used in the Report Generator. The field you create here will appear within the Other page of the **membership module** for you to add to each members record where appropriate.

6.8.1 Yes/No Flag Fields The text in the white boxes on the left will appear as "check boxes" in the "Other" page of a member's record and are options which can be "on" or "off". The example Flag Field below allows you to record whether the member should receive a regular newsletter and would appear in the "Other" page of the members record:

6.8.2 Text Code Fields   The text entered in the white boxes in the left hand column will appear as the title of a data box into which you can enter text in the "Other" page of a member's record. The example below allows you to record any other association held by a member such as the Lions Club and would appear in the "Other" page of the members record:

All your flag fields and text code fields will appear in the columns page of the Report Generator and can be included in your custom reports. The prime difference appears when you specify the attributes of either column using the Column Attributes button at the bottom of the middle list.

6.8.3 Using user-defined fields in the Report Generator

Flag Fields

The attributes for a flag field will be included in members' records where the option is selected, not selected or both. If we include the Newsletter field in a report and click on Column Attributes we would see the following window. This provides us with criteria upon which to include members into the report.

Text Code Fields

We can specify a string of text which must correspond to the member's record in this field. If we typed "Lions" in the bottom window then only members' records who also contained "Lions" would be included in our report.

Appendix A

Structuring Your Coding System and Using Wildcards

Whenever possible, try to structure your code in such a fashion that common letters are used for common "types" of membership groups, prices and discounts. The coding system within GCGold employs a technique called Wildcards which provides you with a shorthand for specifying which items to include in operations such as billing or reports. The more structured your coding system, the more you can use Wildcards to make the system easier to use and more efficient.

An example of structuring codes is given below where we have five different membership group codes describing five different types of memberships but, as they are all male, they all start with the letter "M". The letters after the initial M are used to refine the description of the members included in each group, for example;

MFU: Male Full Member (note that the age range is 25 to 55)
MCD25:   Male Cadet, Under 25
MCD21:   Male Cadet, Under 21
MSN: Male Senior Member
MSNJ: Male Senior Member Joint

Whenever you have the option of specifying which membership group codes are to be included in an operation (such as a membership or competition filter, custom report or when generating invoices) you can use the asterisk character * (known as a wildcard) as a form of shorthand to mean "All Codes". In other words, M* translates as "All Codes" that start with the letter M irrespective of what letters follow. If you wished to include all the above codes in an operation, specifying to include "M*" would have the same affect as adding each code individually.

Examples of using Wildcards.

If we wished to generate invoices for all our male members (including seniors and juniors) we use the fact that the common element of all male groups is that they begin with the letter M. Rather than including each code individually we can enter M*. This will include all male members within this invoice. We can also use the second and third letters of the code to specify other groups, for example;

MCD* will include all the junior cadets (MCD21 and MCD25) but no members over 25 years old.
MS* will include MSN and MSNJ (but no members under 55 years old.

Using multiple codes in a filter.

To include a number of group codes you add them into the list separated by a comma, for example:

MCD*,MS* will include all junior and senior members but not members between 25 and 55.

You can specify a range of group codes using wildcards but exclude a specific code by placing a minus sign in front, for example;

M*, -MSNJ will include all male members (of all ages) but will exclude senior joint members.

The same techniques can be applied to price codes, discounts and payment codes. This is very powerful tool and, if you structure your all your codes correctly, will make the production of documents such as invoices and complex reports the matter of a few minutes work.

Appendix B

Data Fields Available with the Report Generator

Field Title	Description	Field Title	Description
A/balance	£ Account balance	HCAP (Play)	Playing handicap
Ac_defterms	XXXXXXX	Initials	Initials
Address	1st Line of address	Joined	Date of joining
Address(1)	2nd Line of address	Locker (1)	Locker number
Address (2)	3rd Line of address	Locker (2)	2nd Locker number
Bk_account	Bank account No.	M/F	Male or Female
Bk_address(1)	1st Line of bank address	Mem. No.	Membership no.
Bk_address(2)	2nd Line of bank address	Name (S, FI)	e.g. Smith, David G
Bk_county	County of bank address	Name (S, Tfi)	e.g. Smith, Mr David G
Bk_name	Bank name	Name (Tfis)	e.g. Mr David G Smith
Bk_postcode	Bank postcode	Name (Tis)	e.g. Mr D G Smith
Bk_sortcode	Bank sort code	Occupation	Occupation
Car reg.	Car registration	P code	Home Postcode
Club Name	Home club name	Proposer	Membership Proposer
Club ID	Home club ID	Seconder	Membership Seconder
County	County of residence	Shares	Shares Held
DD Due	£ Direct debits due	Spec. Charge	Special Charge Codes applying
DD Ident	Direct debit identifier	Spec. Discount	Special Discount Codes applying
DD Seq	Direct debit sequence No.	Surcharges	Surcharges
Div	Dividend on Shares	Surname	Surname
Date of Birth	Date of birth	Tel	Home Telephone
Fax	Fax number	Tel (day)	Daytime Telephone
Forename	Forename	Tel (mob)	Mobile Telephone
Group Name	Membership group name	Title	Mr/Miss/Mrs
Group ID	Membership group code	Total Billed	£ Total Billed (within period)
H/C Club	Home handicap club	Total Paid	£ Total Paid (within period)
H/C Club No.	ID of home handicap club	Town	Home Town
HCAP	Exact handicap		