



**Membership and Tournament System**

# **Society Secretary Handbook**

[www.swgsa.co.za](http://www.swgsa.co.za)

## Introduction

The Secretary's role is pivotal in ensuring that the system fulfils its potential for the Society. The most important task is ensuring that the members' details are complete. Without a full list of members, the system will not function optimally.

## New members

When the application for a new member is accepted by the society committee, a welcome email must be sent to the member with the Members Signup Handbook attached. This is done in [Invite new members](#). Up to five members can be invited to sign up by entering their email addresses on the page and sending.

Once a new member has signed up, her details have to be vetted. This is done in [Vet member applications](#). A list of all newly captured members will appear in a list and the secretary needs to select each new member in turn for vetting. To complete this function, the secretary allocates a membership category and, if the member qualifies, allocates further status such as Veteran, Honorary, Associate or Limited. Furthermore, the date that the member was inducted must also be captured. In the case of a Waitlist member, the date will reflect when the member was accepted into the society by the committee. This date will be overridden when the member is inducted.

Should a name appear that is not recognised as a member of the society, the entry can be deleted during this vetting process.

Should a pending member not have verified her email address, the Secretary can do this on her behalf should the email be known to be correct. Use the Update function to achieve this.

## Member details

While it is the member's role to maintain her own details on the system, it is the Secretary's role to ensure that this is adhered to. The Secretary has the ability to do this on behalf of a member in [Manage society members](#). The personal details of a member are divided into Member, Contact, Partner, and Membership Details. Only the Secretary is able to change Membership Details, whereas both the Member and the Secretary are able to make changes to the other details.

Where a member is unable or unwilling to use a computer and resigns herself to that fact, the secretary can create a new member on this screen. Where this new member still plays golf, the SA Player ID must be entered. Otherwise this field must be left blank. The rest of the fields are self explanatory.

## Roles

The role played by various members of the society committee is an important aspect of the system. It is the Secretary's task to allocate these roles as they change from time to time, normally after an AGM. This is done in [Manage society roles](#). The roles to be allocated are Captain, Treasurer, Scorer, Registration, Sales and Function Organiser. A member can have more than one role, and multiple members can be allocated a role. The roles of Captain and Treasurer are self-explanatory. The scorer can capture and vet scores after a competition. The role of Registration is to control the arrival of participants for an event, normally reserved for the National Tournament. The role of Sales is for the

quartermaster for sale of merchandise, either at Nationals or locally within the society. The role of Function Organiser is to control the participants attending functions at an event, also normally reserved for the National Tournament.

The control of the role of Secretary is initially done by the Union Secretary for each of the Societies.

In the Society Roles list, there is a 'number of roles' allocated to each member. Each member has at least one role – the ability to manage their own affairs.

### Users

The term User is related to a person who has authority to use the system. Each member is a User, but a User need not be a member. A society may engage the services of a non-member to perform a role in the system, like Secretary or Treasurer. Such users have their details captured in [Manage society roles](#), [Create new user](#), where after they are allocated their role in the same way that members do. Members of the system development team are in the Users list. Please do not change their details as they are used for testing and bug-fixing purposes.

### Manage society details

The initial creation of a society is done at Union level, but it is then the Secretary's job to keep the details of the society current. The Contact User role is allocated to a user who has the role of Secretary in the society. These details are used when documents and reports are generated by the system.

### Upcoming Events

On the right hand side of the Member Home screen is a list of all events in which your society is involved. They are initially set up by the National Tournament Director (Nationals) and the Society Captain (local and combined events).

It is the Secretary's job, along with the Captain, to ensure members enter events timeously, and to assist those members who can't or won't enter.

To take a member's entry and capture it on the system, first choose the event by clicking on the name. Make sure that the event is open for applications prior to commencing.

The Event Details or National Details screen is displayed where you are allowed to [Apply by Proxy](#). On the Apply for Event by Proxy screen, you have to choose the member who has requested you to help. Do this by clicking on the three dots on the right of the Member field. Type in any part of her Surname or Known Name and press Search. Click on the targeted member and Select.

Then select the requested competitions and functions, with the required options for cart, caddie and partner, and submit the application.

This will result in her name being added to the event list and an email, with invoice attached, being sent once her application is Accepted. For most local events, she is automatically Accepted, and no invoice will be attached as she will settle in the Pro Shop.

Some functions will be invoiced in arrears once the cost is determined. An email with invoice will be sent at this time.