

Person 1
Person 2

Date

Credit Book

1. Requested By

PGA Sections but can be used by other Associations

2. Customers Affected

Additionally to a **feature enablement**, the following two conditions should both be met:

- **Master Roster Registration OR SSO**
- **Credit Card Payments** enabled

3. High-Level Summary

With the introduction of the Credit Book feature, users can maintain a virtual balance within Tournament Management.

This empowers customers to effortlessly manage refunds as credits, eliminating the need for actual bank transfers once funds have been confirmed and transferred from the 3rd party payment provider account to the customer's bank account

Additionally, funds can be awarded to the credit balance through the manager interface (e.g., scholarships that can be used for event registration).

Overall, the Credit Book streamlines the management of financial transactions, making it easier to handle refunds and simplifying the reconciliation of bank statements.

4. Functional Description

4.1. Overview

The goal of this functionality is to provide easy management of Credits to the customer, while allowing users to visualize and use Credits when making purchases (event registration) within Tournament Management.

In order to have access to the functionality, the following conditions must be met:

- **Credit Book feature** enabled
AND
- **Master Roster Registration OR SSO** enabled
AND

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- Credit Card Payments enabled

The screenshot shows a navigation bar at the top with tabs: General Settings, Pricing Plan, Features, Integrations, Access Management, Product Versions, Product Versions Logs, and Golf Hub Fee. Below this is a section titled "Product Feature Customization". Under "Golf Genius Version", there is a dropdown menu showing "Golf Genius TM Club Premium". The "In Development" section contains three items: "Credit Book" (checked and highlighted with an orange border), "Event dashboard plus" (checked), and "Doubles Golf Integration" (unchecked). Each item has a "More Info" link to its right.

Fig. 4.1.1. Credit Book option from Admin Page

The screenshot shows a "Registration" section with several options:

- Always validate Master Roster membership
- Age Eligibility for Teams
- Event Registration Eligibility Criteria
- Invitations List
- Master Roster Registration
- Member or Non-member registration
- Membership Programs

Each option includes a "More Info" link to its right. The "Master Roster Registration" option is highlighted with an orange border.

Fig. 4.1.2. Manager Roster Registration option from Admin Page

The screenshot shows a "Features" section with three checked options:

- Allowed to Process Payments
- Enabled Saved Credit Cards
- Invoice Currency: USA Dollar - \$ - usd

The "Allowed to Process Payments" option is highlighted with an orange border.

Fig. 4.1.3. Manager Roster Registration option from Admin Page

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We're going to go over some use-case scenarios from both the manager's perspective and golfer's perspective below.

4.2. Manager flows

4.2.1. Credit Book Page - Managing Credit Book Golfer's Balance and Generating Reports

In order to manually adjust players' balances, we're introducing a **Credit Book** section under *Customer Center > Payment Center*. The page will show a table of players imported from the master roster.

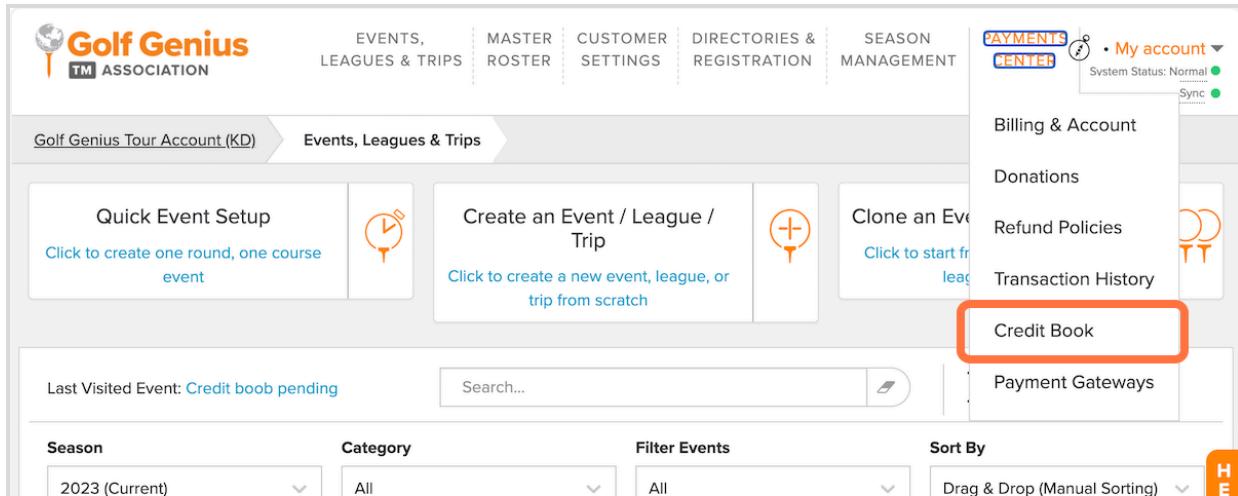


Fig. 4.2.1. New Credit Book page under Payments Center Tab

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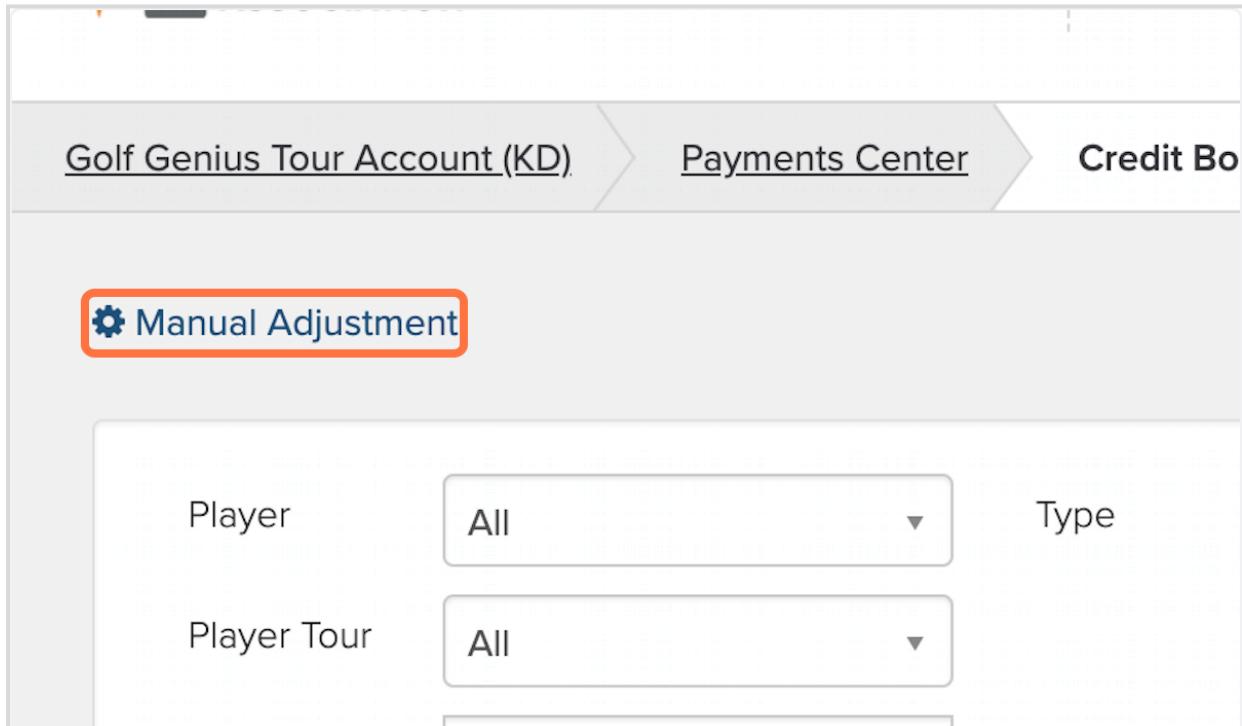


Fig. 4.2.2.. Manual Adjustment button that opens the Manual Adjustment Menu

The screenshot shows the Club Premium interface with a navigation bar including "Club Premium", "Events, Leagues & Trips", "Master Roster", "Customer Settings", "Directories & Registration", "Season Management", "Payments Center", "Navigator", and "My account". The "Payments Center" tab is active. Below the navigation, there are links for "Payments Center" and "Credit Book". A sub-menu titled "Manual Adjustment" is open, showing a table for "MANUAL ADJUSTMENTS". The table has columns: Player, Event, Amount (USD), Date, Details, Current Balance, and New Balance. A row is selected with values: "Search for a Member", "Event", "100", "2023-10-09", "Details", "USD0.00", and "\$100.00". Buttons for "Add", "more rows", "Go", and "Apply adjustments" are visible. At the bottom, there are filters for "Start Date", "End Date", a checkbox for "Hide golfers with \$0 Balance", and an "Export to Excel" button.

Fig. 4.2.3. Manual Adjustments menu that allows bulk adjustments

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The screenshot shows the 'Payments Center' section of the software. At the top, there are several navigation links: EVENTS, LEAGUES & TRIPS, MASTER ROSTER, CUSTOMER SETTINGS, DIRECTORIES & REGISTRATION, SEASON MANAGEMENT, PAYMENTS CENTER (which is underlined in red), NAVIGATOR, and My account. A status message 'System Status: Normal' is also present.

The main area is titled 'Manual Adjustment' and contains a form with the following fields:

- Player: A dropdown menu set to 'All'.
- Type: A dropdown menu set to 'All'.
- Start Date: An input field.
- End Date: An input field.
- Hide golfers with \$0 Balance
-
-

Below the form is a table listing players with their available balances and actions:

Name :	Available Balance :	Actions
1, PPGA Member	\$50.00	Adjust Balance
Campilaras, Bert	\$166.00	Adjust Balance
Daniels, Jack	\$100.00	Adjust Balance
Dixon2, Ken	\$50.00	Adjust Balance
Dixon3, Ken	\$1.80	Adjust Balance
Dixon, Ashley	\$200.00	Adjust Balance
Dixon, Sr, Ken	\$10.00	Adjust Balance

Fig. 4.2.4. Section with filter players based on name, tour, type, date and the export to excel option

This screenshot shows the 'Payments Center' section again, specifically the 'Credit Book' tab. The interface is identical to Fig. 4.2.4, with the same navigation links and manual adjustment form.

The table below the form lists players with their available balances and actions:

Name :	Available Balance :	Actions
Allison, Dave	\$110.00	Adjust Balance
Benavides, Robert	\$20.00	Adjust Balance
Campilaras, Bert	\$30.00	Adjust Balance
Fernandez, Blaise	\$50.00	Adjust Balance
Goodwin(Test), Cody	\$20.00	Adjust Balance

Fig. 4.2.5. Players Log section and their credit book balance

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4.2.1.1. Player Credit Logs

Any player credit row will have his Name, Available Balance, and Adjust Balance button to open the Adjust Balance popup.

Name :	Available Balance :	Actions
Adam Sandler	\$220.00	Adjust Balance
Anrei Vasiluta	\$100.00	Adjust Balance
Anee Brooks	\$70.00	Adjust Balance
Ashley Foster	\$55.75	Adjust Balance

Fig. 4.2.1.1. Player Credit Log Row

By clicking on a player's name, the table will expand with available past transactions that influenced the player's balance.

Name :	Available Balance :	Actions																																										
Adam Sandler	\$220.00	Adjust Balance																																										
<table><thead><tr><th>ID</th><th>Date / Time ▾</th><th>Event</th><th>Details</th><th>Type</th><th>Amount</th><th>Total Credits Balance ⓘ</th></tr></thead><tbody><tr><td>1087</td><td>05/16/2023, 12:57 PM</td><td>Credit book event</td><td>Open Registration Fee for Credit... ⓘ</td><td>Payment</td><td>(\$150.00) ⓘ</td><td>\$220.00</td></tr><tr><td>1085</td><td>05/15/2023, 06:06 PM</td><td>Manual Adjustment</td><td>N/A ⓘ</td><td>Manual Adjustment</td><td>\$10.00</td><td>\$370.00</td></tr><tr><td>1084</td><td>05/15/2023, 06:06 PM</td><td>Manual Adjustment</td><td>N/A ⓘ</td><td>Manual Adjustment</td><td>(\$20.00)</td><td>\$380.00</td></tr><tr><td>1083</td><td>05/15/2023, 06:06 PM</td><td>Manual Adjustment</td><td>N/A ⓘ</td><td>Manual Adjustment</td><td>(\$10.00)</td><td>\$360.00</td></tr><tr><td>1082</td><td>05/15/2023, 06:05</td><td>Manual</td><td>N/A ⓘ</td><td>Manual</td><td>\$10.00</td><td>\$350.00</td></tr></tbody></table>			ID	Date / Time ▾	Event	Details	Type	Amount	Total Credits Balance ⓘ	1087	05/16/2023, 12:57 PM	Credit book event	Open Registration Fee for Credit... ⓘ	Payment	(\$150.00) ⓘ	\$220.00	1085	05/15/2023, 06:06 PM	Manual Adjustment	N/A ⓘ	Manual Adjustment	\$10.00	\$370.00	1084	05/15/2023, 06:06 PM	Manual Adjustment	N/A ⓘ	Manual Adjustment	(\$20.00)	\$380.00	1083	05/15/2023, 06:06 PM	Manual Adjustment	N/A ⓘ	Manual Adjustment	(\$10.00)	\$360.00	1082	05/15/2023, 06:05	Manual	N/A ⓘ	Manual	\$10.00	\$350.00
ID	Date / Time ▾	Event	Details	Type	Amount	Total Credits Balance ⓘ																																						
1087	05/16/2023, 12:57 PM	Credit book event	Open Registration Fee for Credit... ⓘ	Payment	(\$150.00) ⓘ	\$220.00																																						
1085	05/15/2023, 06:06 PM	Manual Adjustment	N/A ⓘ	Manual Adjustment	\$10.00	\$370.00																																						
1084	05/15/2023, 06:06 PM	Manual Adjustment	N/A ⓘ	Manual Adjustment	(\$20.00)	\$380.00																																						
1083	05/15/2023, 06:06 PM	Manual Adjustment	N/A ⓘ	Manual Adjustment	(\$10.00)	\$360.00																																						
1082	05/15/2023, 06:05	Manual	N/A ⓘ	Manual	\$10.00	\$350.00																																						
Andrei Vasiluta	\$100.00	Adjust Balance																																										
Anee Brooks	\$70.00	Adjust Balance																																										

Fig. 4.2.1.2. Past transactions that influenced the player's balance.

4.2.1.1.1. Types of logs

Payment Log:

Date

- A Payment Log records instances when a golfer pays an entry fee for an event using their Credit Book credits. It reflects the golfer's utilization of their Credit Book balance to cover event expenses, providing a clear history of these transactions, including event details, payment amounts, and transaction dates.

Refund Log:

- A Refund Log documents situations where a golfer receives credits in their Credit Book. This typically occurs due to event cancellations, event transfers, or when a manager cancels the golfer's participation in an event. The Refund Log displays details about the credited event, the refunded credit amount, and the date of the refund.

Manual Adjustment Log:

- A Manual Adjustment Log registers instances when a manager manually adds or deducts credits from a golfer's Credit Book balance. This can be done to rectify errors, make adjustments, or apply special considerations. The Manual Adjustment Log provides a transparent record of these adjustments, including event references, adjustment amounts, and the date when the manager applied the adjustment.

4.2.1.1.2. Payment Log with full Credit Book

Name :			Available Balance :		Actions	
Adam Sandler			\$220.00		Adjust Balance	
ID	Date / Time ▾	Event	Details	Type	Amount	Total Credits Balance ⓘ
1087	05/16/2023, 12:57 PM	Credit book event	Open Registration Fee for Credit... ⓘ	Payment	\$(150.00) ⓘ	\$220.00
1085	05/15/2023, 06:06 PM	Manual Adjustment	N/A ⓘ	Manual Adjustment	\$10.00	\$370.00
1084	05/15/2023, 06:06 PM	Manual Adjustment	N/A ⓘ	Manual Adjustment	(\$20.00)	\$380.00
1083	05/15/2023, 06:06 PM	Manual Adjustment	N/A ⓘ	Manual Adjustment	(\$10.00)	\$360.00
1082	05/15/2023, 06:05	Manual	N/A ⓘ	Manual	\$10.00	\$350.00

Fig. 4.2.1.3. Payment Log with full Credit Book payment

Person 1
Person 2

Date

Name :		Available Balance :		Actions		
Adam Sandler		\$220.00		Adjust Balance		
ID	Date / Time ▾	Event	Details	Type	Amount	Total Credits Balance ⓘ
1087	05/16/2023, 12:57 PM	Credit book event	Open Registration Fee for Credit... ⓘ	Payment	(\$150.00) ⓘ	\$220.00
1085	05/15/2023, 06:06 PM	Manual Adjustment	N/A ⓘ	Manual Adjustment	\$10.00	Amount paid with Credit Card: \$0.00 Amount paid with Credit Book: \$150.00
1084	05/15/2023, 06:06 PM	Manual Adjustment	N/A ⓘ	Manual Adjustment	(\$20.00)	\$380.00
1083	05/15/2023, 06:06	Manual	N/A ⓘ	Manual	(\$10.00)	\$360.00

Fig. 4.2.1.4. Tooltip payment with full Credit Book details

4.2.1.1.3. Payment Log with mixed Credit Book payment

Grace Phillips		\$100.00		Adjust Balance		
Hugh Butterfield		\$75.00		Adjust Balance		
ID	Date / Time ▾	Event	Details	Type	Amount	Total Credits Balance ⓘ
1036	05/11/2023, 11:45 AM	CB 1	Open Registration Fee for CB 1	Refund	(\$75.00) ⓘ	\$75.00
1035	05/11/2023, 11:45 AM	CB 1	Open Registration Fee for CB 1	Payment	(\$25.00) ⓘ	\$0.00
1032	05/11/2023, 07:00 AM	Manual Adjustment	N/A ⓘ	Manual Adjustment	(\$25.00)	\$25.00
Jack Barbara		\$100.00		Adjust Balance		

Fig. 4.2.1.5. Payment Log with mixed payment

Person 1
Person 2

Date

Hugh Butterfield		\$75.00		Adjust Balance		
ID	Date / Time ▾	Event	Details	Type	Amount	Total Credits Balance ⓘ
1036	05/11/2023, 11:45 AM	CB 1	Open Registration Fee for CB 1	Refund	(\$75.00) ⓘ	\$75.00
1035	05/11/2023, 11:45 AM	CB 1	Open Registration Fee for CB 1	Payment	(\$25.00) ⓘ	\$0.00
1032	05/11/2023, 07:00 AM	Manual Adjustment	N/A ⓘ	Manual Adjustment	(\$25.00)	<div style="background-color: black; color: white; padding: 2px;">Amount paid with Credit Card: \$95.00 Amount paid with Credit Book: \$25.00</div>
Jack Barbara		\$100.00		Adjust Balance		
James Gill		\$50.00		Adjust Balance		
Jim Nickolaus		\$160.00		Adjust Balance		

Fig. 4.2.1.6. Tooltip payment with mixed details

Name :		Available Balance :		Actions		
Adam Sandler		\$220.00		Adjust Balance		
ID	Date / Time ▾	Event	Details	Type	Amount	Total Credits Balance ⓘ
1014	05/04/2023, 01:22 PM	Split payments	Open Registration Fee for Split ... ⓘ	Payment	(\$25.00) ⓘ	\$295.00
1010	05/04/2023, 01:02 PM	Manual Adjustment	manager adjustment ⓘ	Manual Adjustment	(\$160.00)	\$320.00
1006	04/28/2023, 11:16 AM	Credit book event	Open Registration Fee for Credit... ⓘ	Refund	(\$80.00) ⓘ	\$160.00
1004	04/28/2023, 11:16 AM	Credit book event	Open Registration Fee for Credit... ⓘ	Refund	(\$80.00) ⓘ	\$80.00
Andrei Vasiluta		\$100.00		Adjust Balance		

Fig. 4.2.1.7. Refund Log with Credit Card and Credit Book

Person 1
Person 2

Date

4.2.1.1.4. Refund Log

Name :		Available Balance :		Actions		
Adam Sandler		\$220.00		Adjust Balance		
ID	Date / Time ▾	Event	Details	Type	Amount	Total Credits Balance ⓘ
1014	05/04/2023, 01:22 PM	Split payments	Open Registration Fee for Split ... ⓘ	Payment	(\$25.00) ⓘ	\$295.00
1010	05/04/2023, 01:02 PM	Manual Adjustment	manager adjustment ⓘ	Manual Adjustment	(\$160.00)	\$320.00
1006	04/28/2023, 11:16 AM	Credit book event	Open Registration Fee for Credit... ⓘ	Refund	(\$80.00) ⓘ	\$160.00
1004	04/28/2023, 11:16 AM	Credit book event	Open Registration Fee for Credit... ⓘ	Refund	(\$80.00) ⓘ	\$80.00
Andrei Vasiluta		\$100.00		Adjust Balance		

Fig. 4.2.1.8. Tooltip refund details

4.2.1.1.5. Manual Adjustment Log

Name :		Available Balance :		Actions		
Adam Sandler		\$220.00		Adjust Balance		
ID	Date / Time ▾	Event	Details	Type	Amount	Total Credits Balance ⓘ
1018	05/04/2023, 01:22 PM	Split payments	Open Registration Fee for Split ... ⓘ	Refund	(\$25.00) ⓘ	\$320.00
1014	05/04/2023, 01:22 PM	Split payments	Open Registration Fee for Split ... ⓘ	Payment	(\$25.00) ⓘ	\$295.00
1010	05/04/2023, 01:02 PM	Manual Adjustment	manager adjustment ⓘ	Manual Adjustment	(\$160.00)	\$320.00
1006	04/28/2023, 11:16 AM	Credit book event	Open Registration Fee for Credit... ⓘ	Refund	(\$80.00) ⓘ	\$160.00
1004	04/28/2023, 11:16 AM	Credit book event	Open Registration Fee for Credit... ⓘ	Refund	(\$80.00) ⓘ	\$80.00
Andrei Vasiluta		\$100.00		Adjust Balance		
Anee Brooks		\$70.00		Adjust Balance		

Fig. 4.2.1.9. Click on Manual Adjustment

Person 1
Person 2

Date

Name :		Available Balance :		Actions		
Adam Sandler		\$220.00		Adjust Balance		
ID	Date / Time ▾	Event	Details	Type	Amount	Total Credits Balance ⓘ
1018	05/04/2023, 01:22 PM	Split payments	Open Registration Fee for Split ... ⓘ	Refund	(\$25.00) ⓘ	\$320.00
1014	05/04/2023, 01:22 PM	Split payments	Open Registration Fee for Split ... ⓘ	Payment	(\$25.00) ⓘ	\$295.00
1010	05/04/2023, 01:02 PM	Manual Adjustment	manager adjustment ⓘ	Manual	(\$60.00)	\$320.00
1006	04/28/2023, 11:16 AM	Credit book event	Adjusted by Crina Stanica Reason: manager adjustment	Open Registration Fee for Refund	(\$30.00) ⓘ	\$160.00
1004	04/28/2023, 11:16 AM	Credit book event	Open Registration Fee for Credit... ⓘ	Refund	(\$80.00) ⓘ	\$80.00
Andrei Vasiluta		\$100.00		Adjust Balance		

Fig. 4.2.1.10. Tooltip manual adjustments details

4.2.1.2. Adjust Player Balance

Managers can adjust a player's individual credit balance through the **Adjust Balance** action, available on the Credit Book page.

Allison, Dave	\$200.00	Adjust Balance
Benavides, Robert	\$100.00	Adjust Balance
Campinaras, Bert	\$100.00	Adjust Balance
Goodwin(Test), Cody	\$20.00	Adjust Balance

Fig. 4.2.1.2.1. Adjust Balance Button

A player's credit balance can be adjusted by both positive and negative values.

Date

The screenshot shows the 'Credit Book Manual Adjustment' dialog box. At the top, it displays player information: Player Name (Goodwin(Test), Cody) and Player Email (cugolfer2016@aol.com). Below this, the 'Current Balance' is listed as \$20.00. The 'Amount' field is highlighted with a red border and contains the value '80'. To the right of the amount, the 'New Balance' is shown as '\$100.00'. There is also a 'Comment' field with a text area below it. At the bottom of the dialog are two buttons: 'Cancel' and 'Submit'.

Fig. 4.2.1.2.2. Credit Book Manual Adjustment Popup with Amount

Dynamic change New Balance according to the new Amount.

4.2.1.2.1. Add or subtract credits from Credit Book Balance using Manual Adjustment

The value shown in the table serves as a visual aid for managers, helping them better understand the Credit Book balances. To comprehend this, let's compare this with the fundamental accounting concepts debit and credit.

In accounting, there is always a credit to offset a debit. When you add money to a Credit Book, you are essentially 'crediting' or increasing the balance within the Credit Book. Conversely, when money is used from the Credit Book, it's considered a 'debit' or subtraction from the balance.

When you see a positive amount enclosed in parentheses, it represents a credit or an increase in the Credit Book balance. Conversely, when you see a negative amount outside of parentheses, it indicates a debit or a decrease in the balance.

Person 1
Person 2

Date

The screenshot shows the 'Credit Book Manual Adjustment' dialog box. The 'Player Name' is 'Goodwin(Test), Cody' and the 'Player Email' is 'cugolfer2016@aol.com'. The 'Current Balance' is '\$20.00'. The 'Amount' input field contains '80'. The 'New Balance' is '\$100.00'. A red box highlights the 'New Balance' field. Below it is a 'Comment' input field containing 'add 80 dollars'. At the bottom are 'Cancel' and 'Submit' buttons.

Fig. 4.2.1.2.3. Added \$80 to the New Balance

This screenshot is identical to Fig. 4.2.1.2.3, but the 'Comment' input field now contains 'add 80 dollars' instead of 'N/A'. A red box highlights the 'Comment' field.

Fig. 4.2.1.2.4. Included a comment

The screenshot shows a table of manual adjustments for 'Goodwin(Test), Cody'. The table has columns: ID, Date / Time, Event, Details, Type, Amount, and Total Credits Balance. There are two rows:

ID	Date / Time	Event	Details	Type	Amount	Total Credits Balance
1047	05/16/2023, 12:54 PM	Manual Adjustment	add 80 dollars ⓘ	Manual Adjustment	(\$80.00)	\$100.00
1035	05/09/2023, 12:00 AM	Manual Adjustment	N/A ⓘ		20.00	\$20.00

A red box highlights the 'Details' column for the first row, which contains 'add 80 dollars ⓘ'. Red arrows point from the word 'Adjust' in the 'Event' column to the 'Amount' and 'Total Credits Balance' columns of the same row. A vertical 'HELP' button is visible on the right side of the screen.

Person 1
Person 2

Date

Fig. 4.2.1.2.5. A new row with the type Manual Adjustment with the amount of \$80.

Campinaras, Bert	\$100.00	Adjust Balance				
Goodwin(Test), Cody	\$100.00	Adjust Balance				
ID	Date / Time ▾	Event	Details	Type	Amount	Total Credits Balance ⓘ
1047	05/16/2023, 12:54 PM	Manual Adjustment	add 80 dollars ⓘ	Manual Adjustment	(\$80.00)	\$100.00
1035	05/09/2023, 12:00 AM	Manual Adjustment	N/A ⓘ	Adjusted by Rafael Ardeleanu Reason: add 80 dollars	20.00	\$20.00

Fig. 4.2.1.2.6. The tooltip contains details like user that added and the reason

Credit Book Manual Adjustment

Player Name	Goodwin(Test), Cody
Player Email	cugolfer2016@aol.com
Current Balance	\$100.00
Amount	<input type="text" value="-80"/>
New Balance	\$20.00
Comment	<input type="text"/>

Cancel Submit

Fig. 4.2.1.2.7. Subtract \$80 from the Balance

Person 1
Person 2

Date

Name :	Available Balance :	Actions	
Allison, Dave	\$200.00	Adjust Balance	
Benavides, Robert	\$100.00	Adjust Balance	
Campinaras, Bert	\$100.00	Adjust Balance	
Goodwin(Test), Cody	\$20.00	Adjust Balance	
ID	Date / Time ▾	Event	Details
1048	05/16/2023, 01:13 PM	Manual Adjustment	N/A ⓘ
1047	05/16/2023, 12:54 PM	Manual Adjustment	add 80 dollars ⓘ
1035	05/09/2023, 12:00 AM	Manual Adjustment	N/A ⓘ
Type	Amount	Total Credits	Balance ⓘ
Manual Adjustment	\$80.00	\$20.00	
Manual Adjustment	(\$80.00)	\$100.00	
Manual Adjustment	(\$20.00)	\$20.00	

Fig. 4.2.1.2.8. A new row with the type Manual Adjustment amounting to \$80.

4.2.1.3. Manual Adjustment and Bulk Adjustments

1. Manual Adjustment button that opens the Manual Adjustment Menu

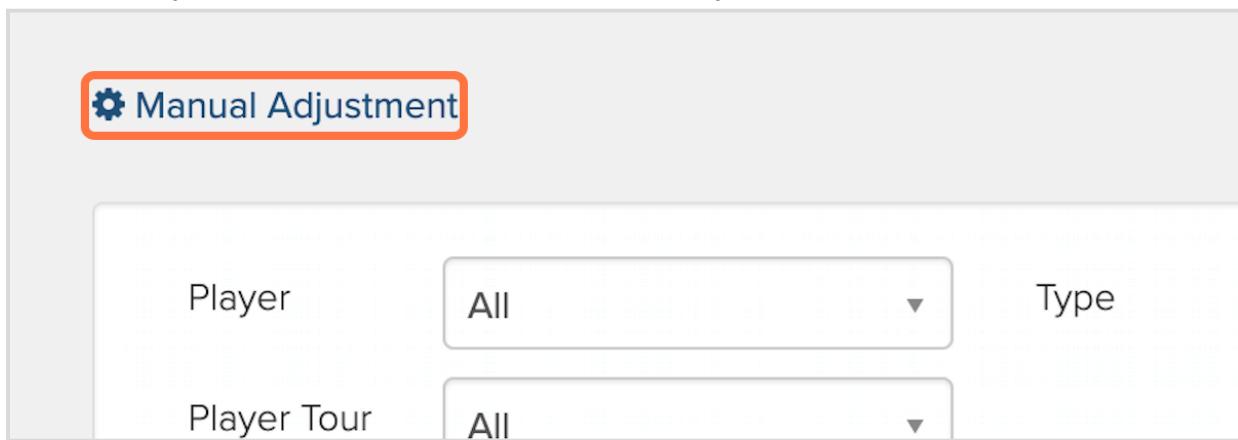


Fig. 4.2.1.3.1. Manual Adjustment option on the Credit Book page

2. Manual Adjustments menu that allows single and bulk adds

Person 1
Person 2

Date

The screenshot shows the 'MANUAL ADJUSTMENTS' section. At the top, there are filters for 'Player', 'Event', 'Amount (USD)', 'Date', and 'Details'. Below these are buttons for 'Add', '5 more rows', and 'Go'. On the right, there are buttons for 'Apply Adjustments', 'HELP', and a question mark icon. A red box highlights the 'Player' search input field, which contains 'Search for a ...' and 'allison'. Below the input field, a dropdown menu shows 'Allison, Dave Genius Island GC'.

Fig. 4.2.1.3.2. Manual Adjustment section on the Credit Book page

3. Type any player from the Master Roster

This screenshot shows the same 'MANUAL ADJUSTMENTS' section as above, but with a different focus. A red box highlights the 'Player' search input field, which now contains 'allison'. Below the input field, the dropdown menu shows 'Allison, Dave Genius Island GC'.

Fig. 4.2.1.3.3. Manual Adjustment - Player search

4. See his current balance

This screenshot shows the 'MANUAL ADJUSTMENTS' section again. A red box highlights the 'Current Balance' column, which displays '\$200.00'. The 'New Balance' column also shows '\$200.00'.

Fig. 4.2.1.3.4. Manual Adjustment - Current Credit Book balance information

Person 1
Person 2

Date

5. Add any USD amount

The screenshot shows a table titled "MANUAL ADJUSTMENTS". A single row is selected, with the "Amount (USD)" input field highlighted by a red box. The row contains the following data: Player (Allison, Dave), Event (empty), Amount (USD) (100), Date (2023-10-10), Details (empty), Current Balance (\$100.00), and New Balance (\$100.00). Below the table are filters for Player (All), Type (All), and a search bar.

Fig. 4.2.1.3.5. Manual Adjustment - Amount to be added to the Credit Book balance

6. And the new balance will change accordingly

The screenshot shows a table titled "MANUAL ADJUSTMENTS". A single row is selected, with the "New Balance" input field highlighted by a red box. The row contains the following data: Player (Allison, Dave), Event (empty), Amount (USD) (10), Date (2023-05-17), Details (empty), Current Balance (\$200.00), and New Balance (\$300.00). Below the table are filters for Player (All), Type (All), and a search bar.

Fig. 4.2.1.3.6. Manual Adjustment - New Balance = Current Balance + Amount

7. To bulk add, one method is to click the plus icon

The screenshot shows a table titled "MANUAL ADJUSTMENTS". A single row is selected, with the "New Balance" input field highlighted by a red box and a red plus icon to its right. The row contains the following data: Player (Allison, Dave), Event (empty), Amount (USD) (10), Date (2023-05-17), Details (empty), Current Balance (\$200.00), and New Balance (\$300.00). Below the table are filters for Player (All), Type (All), and a search bar.

Fig. 4.2.1.3.7. Manual Bulk Adjustment - Adding a new player row

Person 1

Person 2

Date

8. We will add another player

Player	Event	Amount (USD)	Date	Details	Current Balance	New Balance
Allison, Dave x ▾		100	2023-05-17		\$200.00	\$300.00
Munz, Robert x ▾		00	2023-05-17		\$0.00	\$100.00
Search for a ... ▾		100	2023-05-17		\$0.00	\$100.00

Add more rows

Fig. 4.2.1.3.8. Manual Bulk Adjustment - Filling in the details for multiple players at the same time

9. To add multiple rows you can also use this method

Player	Event	Amount (USD)	Date	Details	Current Balance	New Balance
Allison, Dave x ▾		100	2023-05-17		\$200.00	\$300.00
Munz, Robert x ▾		100	2023-05-17		\$0.00	\$100.00
Search for a ... ▾		100	2023-05-17		\$0.00	\$100.00

Add more rows

Fig. 4.2.1.3.9. Manual Bulk Adjustment - Adding multiple players that we need to adjust the balance for

10. After you have finished editing you can click Apply Adjustments

Player	Event	Amount (USD)	Date	Details	Current Balance	New Balance
Allison, Dave x ▾		100	2023-05-17		\$200.00	\$300.00
Munz, Robert x ▾		100	2023-05-17		\$0.00	\$100.00
Campinaras, ... x ▾		100	2023-05-17		\$100.00	\$200.00
Lyons, Cody x ▾		100	2023-05-17		\$0.00	\$100.00

Add more rows

Person 1
Person 2

Date

Fig. 4.2.1.3.10. Manual Bulk Adjustment - Applying Credit Book balance adjustments

11. And all the player's balances will change

The screenshot shows a user interface for manual bulk adjustment. At the top, there are filter options: Player (All), Type (All), Player Tour (All), Start Date (empty), End Date (empty), and a checked checkbox for 'Hide golfers with \$0 balance'. Below the filters are two buttons: 'Apply filters' (orange) and 'Export to Excel'. The main area is a table with three columns: Name, Available Balance, and Actions. The table lists six players with their current balances and a 'Adjust Balance' link for each. A vertical orange border highlights the table area.

Name :	Available Balance :	Actions
Allison, Dave	\$300.00	Adjust Balance
Benavides, Robert	\$100.00	Adjust Balance
Campinaras, Bert	\$200.00	Adjust Balance
Goodwin(Test), Cody	\$20.00	Adjust Balance
Lyons, Cody	\$100.00	Adjust Balance
Munz, Robert	\$100.00	Adjust Balance

Fig. 4.2.1.3.11. Manual Bulk Adjustment - Adjustments applied and visible under the Credit Book table

4.2.1.4. Filtering

Above the table, we created a section dedicated to filtering player log payments, as well as export options.

1. Filter by Player Name

The screenshot shows the 'Manual Adjustment' section. It includes filter fields for Player (All), Player Tour (All), Start Date (All), End Date (empty), and a checkbox for 'Hide golfers with \$0 balance'. Below the filters is an 'Apply filters' button. The main area displays a table with columns: Name, Available Balance, and Actions. The first row shows 'Adelsberger, Connor' with '\$0.00' and 'Adjust Balance'. A vertical orange border highlights the filter dropdown and the table area.

Name :	Available Balance :	Actions
Adelsberger, Connor	\$0.00	Adjust Balance

Fig. 4.2.1.4.1. Filtering - Player based

Person 1
Person 2

Date

2. It will only show the Player that we filtered

The screenshot shows the 'Manual Adjustment' filter interface. At the top, there are four dropdown menus: 'Player' set to 'Allison, Dave', 'Type' set to 'All', 'Player Tour' set to 'All', and 'Start Date' and 'End Date' both empty. To the right of these is a checkbox 'Hide golfers with \$0 balance'. Below the filters is an orange button 'Apply filters'. To the right of the filters is an orange 'Export to Excel' button and a vertical 'HELP' icon. The main area displays a table with three columns: 'Name', 'Available Balance', and 'Actions'. A single row is shown for 'Allison, Dave' with a balance of '\$200.00' and an 'Adjust Balance' link. This entire table row is highlighted with a red border.

Fig. 4.2.1.4.2. Filtering - Player based - results of the filter

3. Filter by Type

The screenshot shows the 'Manual Adjustment' filter interface. The 'Type' dropdown menu is open, displaying 'All' at the top, followed by 'Payment', 'Refund', and 'Manual Adjustment'. The 'All' option is highlighted with a blue background. The rest of the interface is identical to Fig. 4.2.1.4.2, including the filters, export options, and the table below.

Fig. 4.2.1.4.3. Filtering - Log type based

4. Filter by Player Tour (this will only show if the customer has the Tour feature enabled)

Person 1
Person 2

Date

The screenshot shows the 'Manual Adjustment' interface. At the top, there are dropdown menus for 'Player' (set to 'All') and 'Type' (set to 'All'). Below these is a dropdown menu for 'Player Tour' with the option 'All' selected. A search bar is next to it. To the right of the search bar are 'Start Date' and 'End Date' fields. A checkbox labeled 'Hide golfers with \$0 balance' is checked. An 'Export to Excel' button is also present. On the far right, there is a vertical 'HELP' icon. On the left, there is a 'Name:' filter set to 'Allison, Dave'. A large orange box highlights the 'Player Tour' dropdown menu, which lists 'All', 'No Tour', 'East', 'North', 'South', and 'West'. The 'All' option is highlighted with a blue background. Below the filters, a table displays a single row for 'Allison, Dave' with an available balance of '\$200.00' and an 'Adjust Balance' link.

Fig. 4.2.1.4.4. Filtering - Tour based (if Tours enabled)

5. Hide golfers with \$0 balance is not enabled

This screenshot is similar to the previous one but with a key difference: the 'Hide golfers with \$0 balance' checkbox is unchecked. The rest of the interface, including the filters, table header, and data, remains the same.

Fig. 4.2.1.4.5. Filtering - Hide/show players with a \$0 balance from the list of credit book transactions

6. If you have the checkbox 'Hide golfers with \$0 balance' unchecked, the player logs will show the whole roster, including players that do not have a positive credit book balance

Person 1
Person 2

Date

The screenshot shows a software interface for managing golfer balances. At the top, there are input fields for 'Start Date' and 'End Date'. Below these are two buttons: 'Apply filters' (orange) and 'Export to Excel' (with a small icon). To the right of the 'Export' button is a checkbox labeled 'Hide golfers with \$0 balance', which is checked and highlighted with a red box. On the far right, there is a vertical 'HELP' button with a question mark icon. The main area displays a table with columns 'Name', 'Available Balance', and 'Actions'. The table lists 12 golfers, all of whom have a balance of '\$0.00'. Each row contains an 'Adjust Balance' link under the 'Actions' column.

Name :	Available Balance :	Actions
Adelsberger, Connor	\$0.00	Adjust Balance
Allison, Dave	\$200.00	Adjust Balance
Benavides, Robert	\$100.00	Adjust Balance
Campinaras, Bert	\$100.00	Adjust Balance
Carman, Sue	\$0.00	Adjust Balance
Dixon, Ashley	\$0.00	Adjust Balance
Dixon, Charlee	\$0.00	Adjust Balance
Dixon, Jen	\$0.00	Adjust Balance
Dixon, Melodee	\$0.00	Adjust Balance
Fernandez, Blaise	\$0.00	Adjust Balance
Goodwin(Test), Cody	\$20.00	Adjust Balance

Fig. 4.2.1.4.6. Filtering - Hide/show players with a \$0 balance from the list of credit book transactions -
Showing golfers with \$0 balance

7. Hide golfers with \$0 balance is enabled

This screenshot shows the same software interface as the previous one, but with a different filter setting. The 'Hide golfers with \$0 balance' checkbox is now unchecked, and the table below shows all 12 golfers listed, including those with a balance of '\$0.00'. The rest of the interface elements are identical to the previous screenshot.

Name :	Available Balance :	Actions
Adelsberger, Connor	\$0.00	Adjust Balance
Allison, Dave	\$200.00	Adjust Balance
Benavides, Robert	\$100.00	Adjust Balance
Campinaras, Bert	\$100.00	Adjust Balance
Carman, Sue	\$0.00	Adjust Balance
Dixon, Ashley	\$0.00	Adjust Balance
Dixon, Charlee	\$0.00	Adjust Balance
Dixon, Jen	\$0.00	Adjust Balance
Dixon, Melodee	\$0.00	Adjust Balance
Fernandez, Blaise	\$0.00	Adjust Balance
Goodwin(Test), Cody	\$20.00	Adjust Balance

Fig. 4.2.1.4.7. Filtering - Hide/show players with a \$0 balance from the list of credit book transactions -
Changing filter option

8. The player logs will show only the people who have a credit book balance

Person 1
Person 2

Date

The screenshot shows a software interface for managing credit book transactions. At the top, there are filters for 'Player' (set to 'All'), 'Type' (set to 'All'), 'Player Tour' (set to 'All'), 'Start Date' (empty), and 'End Date' (empty). To the right of these filters is a checkbox labeled 'Hide golfers with \$0 balance' with a checked status, which is highlighted by a red rounded rectangle. Below the filters is an 'Apply filters' button. To the right of the filters is an 'Export to Excel' button. On the far right, there is a vertical 'HELP' button with a question mark icon. The main area displays a table of transactions with columns: 'Name :', 'Available Balance :', and 'Actions'. The table rows are: Allison, Dave (\$200.00, Adjust Balance); Benavides, Robert (\$100.00, Adjust Balance); Campinaras, Bert (\$100.00, Adjust Balance); and Goodwin(Test), Cody (\$20.00, Adjust Balance). The entire table area is also highlighted with a red border.

Fig. 4.2.1.4.8. Filtering - Hide/show players with a \$0 balance from the list of credit book transactions -
Hiding golfers with \$0 balance

9. Filter by date intervals

The screenshot shows a software interface for managing credit book transactions, similar to Fig. 4.2.1.4.8. At the top, there are filters for 'Player' (set to 'All'), 'Type' (set to 'All'), 'Player Tour' (set to 'All'), and 'Start Date' (empty). Below these is a date range selector consisting of 'Start Date' and 'End Date' fields, with a calendar overlay showing 'May 2023' and specific dates selected. This date range area is highlighted by a red rounded rectangle. To the right of the date range is a checkbox labeled 'Hide golfers with \$0 balance' with a checked status. Below the date range is an 'Apply filters' button. To the right of the date range is an 'Export to Excel' button. On the far right, there is a vertical 'HELP' button with a question mark icon. The main area displays a table of transactions with columns: 'Name :', 'Available Balance :', and 'Actions'. The table rows are: Allison, Dave (\$200.00, Adjust Balance); Benavides, R. (\$100.00, Adjust Balance); Campinaras, Bert (\$100.00, Adjust Balance); and Goodwin(Test), Cody (\$20.00, Adjust Balance). The entire table area is also highlighted with a red border.

Fig. 4.2.1.4.9. Filtering - Transactions date range based

4.2.1.5. Generating reports

1. To generate a report, click Export to Excel. This will export to Excel data according to the filters we set in place.

The screenshot shows the 'Credit Book' section of a software interface. At the top, there are four input fields: 'Player' (set to 'All'), 'Type' (set to 'All'), 'Player Tour' (set to 'All'), and two date fields ('Start Date' and 'End Date'). Below these is a checkbox labeled 'Hide golfers with \$0 balance'. At the bottom left is an 'Apply filters' button, and at the bottom right is an 'Export to Excel' button, which is highlighted with an orange border. A vertical 'HELP?' icon is on the far right. The main area displays a table with columns 'Name', 'Available Balance', and 'Actions'. The table lists four golfers: Allison, Dave (\$200.00); Benavides, Robert (\$100.00); Campinaras, Bert (\$100.00); and Goodwin(Test), Cody (\$20.00). Each row has an 'Adjust Balance' link under 'Actions'.

Name :	Available Balance :	Actions
Allison, Dave	\$200.00	Adjust Balance
Benavides, Robert	\$100.00	Adjust Balance
Campinaras, Bert	\$100.00	Adjust Balance
Goodwin(Test), Cody	\$20.00	Adjust Balance

Fig. 4.2.1.5.1. Generating reports - Export to excel option on the Credit Book page

2. After the report has been generated you can download it

The screenshot shows the 'Preparing Credit Book XLS' page. On the left, there's a 'TIP of the DAY' section with a lightbulb icon and the text 'Utilizing the Pre-Play Audit'. It includes a table titled 'College Scoring - All Golfers' showing individual player scores across various holes. On the right, a large green checkmark is displayed inside a circle. Below it, a message says 'Your request has been completed!'. At the bottom, there are 'Download XLS' and 'Back' buttons. A vertical 'HELP?' icon is on the far right.

TIP of the DAY

Utilizing the Pre-Play Audit

Preparing Credit Book XLS

Your request has been completed!

Download XLS

Back

Fig. 4.2.1.5.2. Generating reports - Excel generation job page

Person 1
Person 2

Date

The XLS file generated will have multiple sheets, that are providing a structured overview of Credit Book-related data, allowing for easy access and analysis of golfer balances, payments, refunds, manual adjustments, and summary statistics.

b4.2.1.5.1. Balances Tab

- **Name:** The golfer's or customer's name.
- **Available Balance:** The current credit balance available to each golfer.

Name	Available Balance			
Adelsberger, Connor	\$0.00			
Allison, Dave	\$200.00			
Benavides, Robert	\$100.00			
Campinaras, Bert	\$100.00			
Dixon, Ashley	\$0.00			
Dixon, Charlee	\$0.00			
Fernandez, Blaise	\$0.00			
Goodwin(Test), Cody	\$20.00			

Fig. 4.2.1.5.3. Generating reports - Balances sheet

4.2.1.5.2. Credit Book Payments Tab

- **Event:** The name of the event associated with the payment.
- **Player:** The golfer making the payment.
- **Description:** A brief payment description.
- **Date and Time:** The date and time of the payment.
- **Amount:** The payment amount.
- **Status:** Payment status (e.g., completed).
- **Credit Entry Id:** An identifier for the credit entry.

Person 1
Person 2

Date

Balances		Credit Book Payments		Credit Book Refunds		Manual Adjustments		Summary									
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Person 1
Person 2

Date

- **Date and Time:** The date and time of the adjustment.
- **Amount:** The adjustment amount.
- **Status:** Adjustment status (e.g., applied).
- **Credit Entry Id:** An identifier for the credit entry.

The screenshot shows a software interface for managing credit book adjustments. The top navigation bar includes tabs for 'Balances', 'Credit Book Payments', 'Credit Book Refunds', 'Manual Adjustments' (which is highlighted in green), and 'Summary'. The main content area displays a table titled 'Manual Adjustments' with the following data:

Event	Player	Description	Date and Time	Amount	Status	Credit Entry ID
Manual Adjustment	Goodwin(Test), Cody	N/A	5/16/23	+\$80.00	Paid by other means	1048
Manual Adjustment	Goodwin(Test), Cody	add 80 dollars	5/16/23	+\$80.00	Paid by other means	1047
Manual Adjustment	Campinaras, Bert	add 70 dollars	5/16/23	+\$70.00	Paid by other means	1046
Manual Adjustment	Benavides, Robert	add 80 dollars	5/16/23	+\$80.00	Paid by other means	1045
Manual Adjustment	Allison, Dave	add 90 credit	5/16/23	+\$90.00	Paid by other means	1044

Fig. 4.2.1.5.6. Generating reports - Credit Book Manual Adjustments sheet

4.2.1.5.5. Summary Tab

- **Overall Credit Book Start Balance:** Total credits for all golfers, starting from a specified start date.
- **Credit Book Payment Total:** The sum of payments made using Credit Book balances.
- **Manual Adjustments:** Total credits manually provided by a manager.
- **Overall Credit Book End Balance:** Total credits for all golfers, up to the current date or an end date set by filters.

The screenshot shows a software interface for generating a summary report. The top navigation bar includes tabs for 'Balances', 'Credit Book Payments', 'Credit Book Refunds', 'Manual Adjustments', and 'Summary' (which is highlighted in green). The main content area displays a table with the following data:

Description	Count	Total		
Overall Credit Book Start Date (2023-05-15) Balance	-	\$500.00		
Credit Book Payment Total	4	(\$347.00)		
Manual Adjustments	5	\$240.00		
Overall Credit Book End Date () Balance	-	\$420.00		
TOTAL:	9	\$587.00		

Fig. 4.2.1.5.7. Generating reports - Summary sheet

Person 1
Person 2

Date

4.2.2. Transaction History Page - Administering users balance and generating reports

The Transaction History page has been adjusted to include details regarding the Credit Book Transactions.

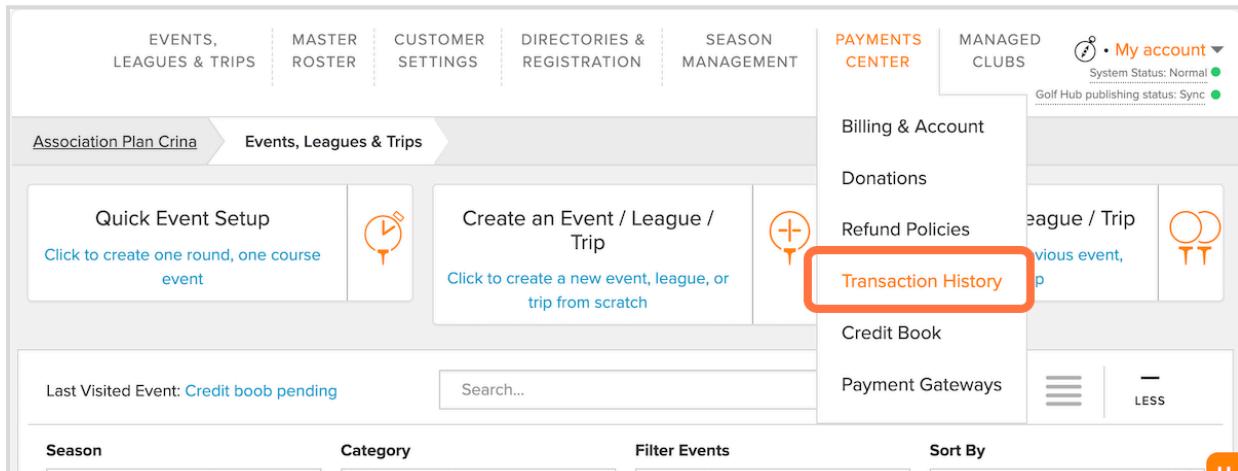


Fig. 4.2.2.1. Transaction History page under Payments Center Tab

This screenshot shows the 'Payments Center' section of the software. At the top, there are tabs for 'Association Plan China', 'Payments Center' (which is highlighted in orange), and 'Transaction History'. A message at the top says, 'We are showing the most recent 5,000 invoices. Please adjust the filters if you can not find the invoice you are looking for.' Below this, there is a large search/filter area with dropdowns for 'Event', 'Player', 'Status', 'AFS Event Name', 'AFS Qualifier Name', 'AFS Revenue Code', 'Merchant Account', 'Start Date', and 'End Date'. There is also a 'Go' button and three export options: 'Export Today', 'Export This Week', and 'Export This Month'. A red box highlights this entire filter section. At the bottom, there is a table with columns 'Transfer In', 'Transfer Out', 'Paid by other means', 'Paid / Cleared', 'Paid / Pending', 'Refunded', and 'TOTAL'. It shows data for 'Transaction Count' and 'Total'.

	Transfer In	Transfer Out	Paid by other means	Paid / Cleared	Paid / Pending	Refunded	TOTAL
Transaction Count	11	11	6	14	6	(10)	38
Total	\$400.00	(\$400.00)	\$0.00	\$695.00	\$220.00	(\$425.00)	\$490.00

Fig. 4.2.2.2. Section with various filters

Person 1
Person 2

Date

Merchant Account

All

Start Date

Go

Export to Excel

	Transfer In	Transfer Out	Paid to
Transaction Count	11	11	6
Total	\$400.00	(\$400.00)	\$0.00

Fig. 4.2.2.3. Export to Excel player log table

Export to Excel

	Transfer In	Transfer Out	Paid by other means	Paid / Cleared	Paid / Pending	Refunded	TOTAL
Transaction Count	11	11	6	14	6	(10)	38
Total	\$400.00	(\$400.00)	\$0.00	\$695.00	\$220.00	(\$425.00)	\$490.00

→ Previous 1 2 3 4 5 6 Next →

Event :	Player :	Description :	Date and Time ▲	Amount :	Status :	Actions
Credit book event	Ron Westwood	Credit Book	05/16/2023, 01:58 PM	\$120.00	Paid by Credit Book	ⓘ
Credit book event	Ron Westwood	Open Registration Fee for Credit... ⓘ	05/16/2023, 01:58 PM	\$30.00 ⓘ	Paid / Pending	ⓘ
Credit book event	Randall Stafford	Open Registration Fee for Credit... ⓘ	05/16/2023, 01:35 PM	\$150.00 ⓘ	Paid / Pending	ⓘ
Credit book event	Adam Sandler	Credit Book	05/16/2023, 12:57 PM	\$150.00	Paid by Credit Book	ⓘ
Credit book event	Adam Sandler	Open Registration Fee for Credit... ⓘ	05/16/2023, 12:57 PM	\$0.00 ⓘ	Paid / Pending	ⓘ
May Event	Sheldon Salt	Open Registration Fee for May Ev... ⓘ	05/15/2023, 05:24 PM	(\$80.00)	Refunded	ⓘ
May Event	Sheldon Salt	Open Registration Fee for May Ev... ⓘ	05/15/2023, 05:21 PM	\$80.00 ⓘ	Paid / Cleared	ⓘ

HELP ⓘ

Fig. 4.2.2.4. Players Log section

Person 1
Person 2

Date

The screenshot shows a search interface with various filters at the top: Event (All), Player (All), Status (All), AFS Event Name (All), AFS Qualifier Name (All), AFS Revenue Code (All), Merchant Account (All), Start Date (2022-05-17), and End Date (empty). Below the filters are three export buttons: 'Export Today', 'Export This Week', and 'Export This Month'. An 'Export to Excel' button is also present. The main area displays a table with columns: Transfer In, Transfer Out, Paid by other means, Paid / Cleared, Paid / Pending, Refunded, and TOTAL. The table has two rows: Transaction Count (11, 11, 6, 14, 6, (10), 38) and Total (\$400.00, (\$400.00), \$0.00, \$695.00, \$220.00, (\$425.00), \$490.00). The 'TOTAL' row is highlighted with a red border. At the bottom right, there is a vertical 'HELP' button with a question mark icon.

Fig. 4.2.2.5. Transfer Sections with details like Transfer In, Out, Total

4.2.2.1. Player Transaction Logs

Any transaction log row will have event name, player name, description, date and time, amount of transaction, status and actions.

Actions dropdown menu will depend on the type of transaction.

The screenshot shows a table of transaction logs. The columns are: Event :, Player :, Description :, Date and Time ▲, Amount :, Status :, and Actions. There are six rows of data, each with a red border around the first four columns. The rows represent different transactions for player Adam Sailor, including registration fees and credit book payments. The last two columns show the status (Paid / Cleared, Paid by Credit Book, Paid by other means) and an actions dropdown menu.

Event :	Player :	Description :	Date and Time ▲	Amount :	Status :	Actions
Credit book 2	Adam Sailor	Open Registration Fee for Credit... ⓘ	05/09/2023, 03:41 PM	\$5.00 ⓘ	Paid / Cleared	ⓘ
Credit book 2	Adam Sailor	Credit Book	05/09/2023, 03:41 PM	\$0.00	Paid by Credit Book	ⓘ
Credit book 2	Adam Sailor	Open Registration Fee for Credit... ⓘ	05/09/2023, 01:57 PM	\$0.00 ⓘ	Paid by other means	ⓘ
Credit book 2	Adam Sailor	Credit Book	05/09/2023, 01:57 PM	\$5.00	Paid by Credit Book	ⓘ
Credit book 2	Adam Sailor	Open Registration Fee for Credit... ⓘ	05/09/2023, 01:54 PM	\$2.00 ⓘ	Paid / Cleared	ⓘ

Fig. 4.2.2.1.1. Player Transaction Log Row

4.2.2.1.1. Types of logs

- Paid / Cleared
 - Paid with credit card and the amount was cleared

Date

- Paid by Credit Book
 - Paid with credit book balance
- Paid by other means
 - Paid with credit book or other means
- Refunded
- Transfer In/Out
- Credit Book Adjustment

4.2.2.1.2. Payment log with full Credit Card

Credit book MorG	Brian Test Ker Ker ⓘ	Open Registration Fee for Credit... ⓘ	05/10/2023, 12:19 PM	\$0.00 ⓘ	Paid / Cleared	
Credit boog MorG	Brian Test Ker Ker ⓘ	Credit Book	05/10/2023, 12:19 PM	\$0.00	Paid by Credit Book	ⓘ
Credit boog MorG	Brian Test	Open Registration Fee for Credit... ⓘ	05/10/2023, 12:05 PM	\$0.00 ⓘ	Paid by other means	
Credit boog MorG	Brian Test	Credit Book	05/10/2023, 12:05 PM	\$5.00	Paid by Credit Book	ⓘ
Credit boog MorG	Brian Test	Open Registration Fee for Credit... ⓘ	05/10/2023, 11:15 AM	\$3.00 ⓘ	Paid / Cleared	▼
Credit boog MorG	Brian Test	Credit Book	05/10/2023, 11:15 AM	\$2.00	Paid by Credit Book	ⓘ
Credit boog MorG	Brian Test	Open Registration Fee for Credit... ⓘ	05/10/2023, 11:02 AM	\$5.00 ⓘ	Paid / Cleared	▼
Credit boog MorG	Brian Test	Credit Book	05/10/2023, 11:02 AM	\$0.00	Paid by Credit Book	ⓘ
Credit book M&G	Brian Test Third Third ⓘ	Open Registration Fee for Credit... ⓘ	05/10/2023, 10:18 AM	\$5.00 ⓘ	Paid / Cleared	▼
Credit book M&G	Brian Test Third Third ⓘ	Credit Book	05/10/2023, 10:18 AM	\$0.00	Paid by Credit Book	ⓘ
Credit book M&G	Brian Test	Open Registration Fee for Credit... ⓘ	05/10/2023, 10:15 AM	\$0.00 ⓘ	Paid by other means	
Credit book M&G	Brian Test	Credit Book	05/10/2023, 10:15 AM	\$5.00	Paid by Credit Book	ⓘ
Credit book M&G	Brian Test	Credit Book	05/10/2023, 10:11 AM	\$0.00	Paid by Credit Book	ⓘ

HELP ⓘ

Fig. 4.2.2.1.2. Payment Log with full Credit Card payment

Person 1
Person 2

Date

Credit boog MorG	Brian Test	Open Registration Fee for Credit...	①	05/10/2023, 12:05 PM	\$0.00	①	Paid by other means
Credit boog MorG	Brian Test	Credit Book		05/10/2023, 12:05 PM	\$5.00	①	Paid by Credit Book
Credit boog MorG	Brian Test	Open Registration Fee for Credit...	①	05/10/2023, 11:15 AM	\$3.00	①	Paid / Cleared
Credit boog MorG	Brian Test	Credit Book		05/10/2023, 11:15 AM	\$2.00	①	Paid by Credit Book
Credit boog MorG	Brian Test	Open Registration Fee for Credit...	①	05/10/2023, 11:02 AM	\$5.00	①	Paid / Cleared
Credit boog MorG	Brian Test	Credit Book		05/10/2023, 11:02 AM	\$0.00	①	Amount Paid with Credit Card: \$5.00 Amount Paid with Credit Book: \$0.00
Credit book M&G	Brian Test Third Third ①	Open Registration Fee for Credit...	①	05/10/2023, 10:18 AM	\$5.00	①	Paid / Cleared
Credit book M&G	Brian Test Third Third ①	Credit Book		05/10/2023, 10:18 AM	\$0.00	①	Paid by Credit Book
Credit book M&G	Brian Test	Open Registration Fee for Credit...	①	05/10/2023, 10:15 AM	\$0.00	①	Paid by other means
Credit book M&G	Brian Test	Credit Book		05/10/2023, 10:15 AM	\$5.00	①	Paid by Credit Book
Credit book M&G	Brian Test	Credit Book		05/10/2023, 10:11 AM	\$0.00	①	Paid by Credit Book

Fig. 4.2.2.1.3. Tooltip payment with full Credit Card details, including the amount paid with Credit Card and Credit Book

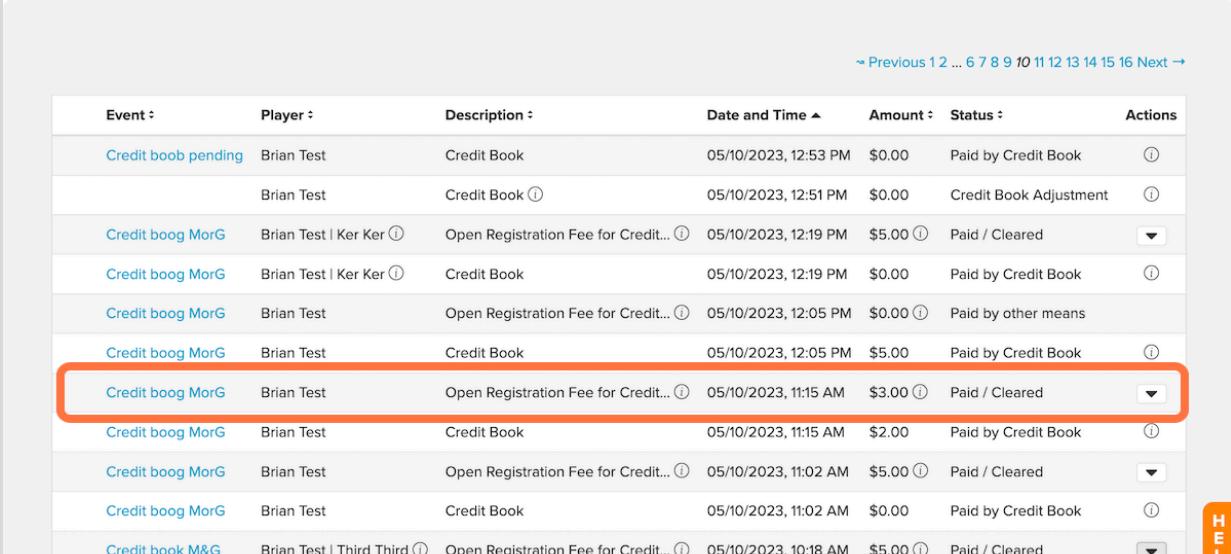
Credit boog MorG	Brian Test	Open Registration Fee for Credit...	①	05/10/2023, 12:05 PM	\$0.00	①	Paid by other means
Credit boog MorG	Brian Test	Credit Book		05/10/2023, 12:05 PM	\$5.00	①	Paid by Credit Book
Credit boog MorG	Brian Test	Open Registration Fee for Credit...	①	05/10/2023, 11:15 AM	\$3.00	①	Paid / Cleared
Credit boog MorG	Brian Test	Credit Book		05/10/2023, 11:15 AM	\$2.00	①	Paid by Credit Book
Credit boog MorG	Brian Test	Open Registration Fee for Credit...	①	05/10/2023, 11:02 AM	\$5.00	①	Paid / Cleared
Credit boog MorG	Brian Test	Credit Book		05/10/2023, 11:02 AM	\$0.00	①	Paid by Credit Book
Credit book M&G	Brian Test Third Third ①	Open Registration Fee for Credit...	①	05/10/2023, 10:18 AM	\$5.00	①	Paid / Cleared
Credit book M&G	Brian Test Third Third ①	Credit Book		05/10/2023, 10:18 AM	\$0.00	①	Paid by Credit Book
Credit book M&G	Brian Test	Open Registration Fee for Credit...	①	05/10/2023, 10:15 AM	\$0.00	①	Paid by other means
Credit book M&G	Brian Test	Credit Book		05/10/2023, 10:15 AM	\$5.00	①	Paid by Credit Book
Credit book M&G	Brian Test	Credit Book		05/10/2023, 10:11 AM	\$0.00	①	Paid by Credit Book

Fig. 4.2.2.1.4. Payment Log with Credit Book

4.2.2.1.3. Payment Log with mixed payment

Person 1
Person 2

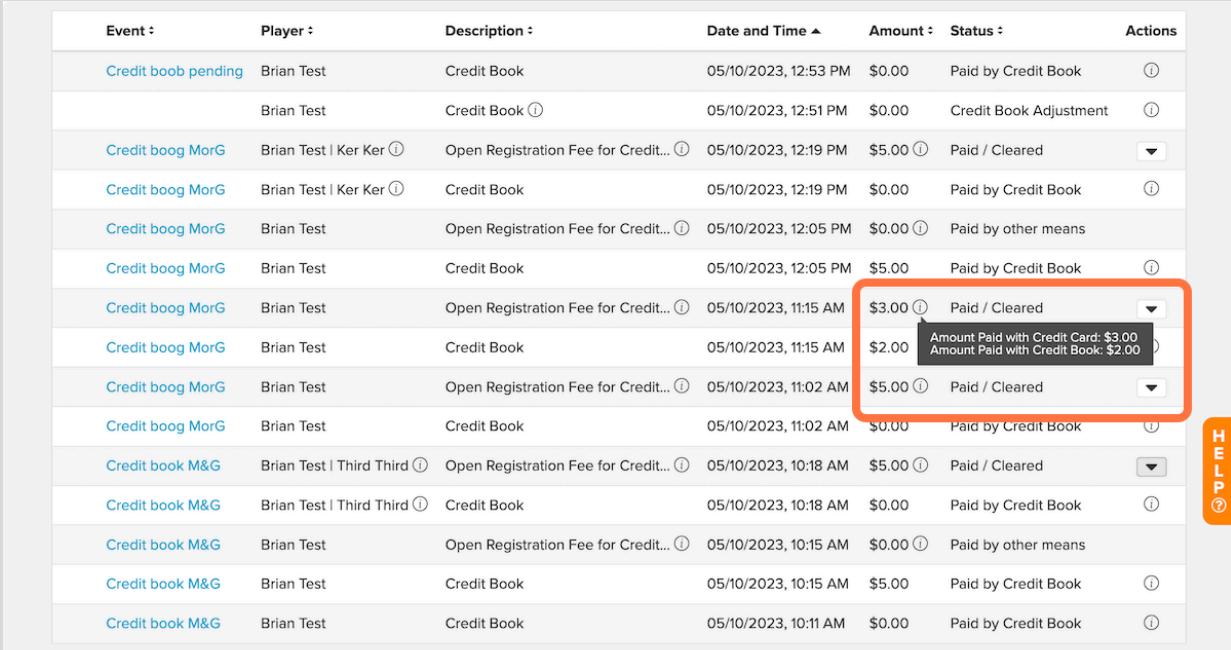
Date



~ Previous 1 2 ... 6 7 8 9 10 11 12 13 14 15 16 Next →

Event :	Player :	Description :	Date and Time ▲	Amount :	Status :	Actions
Credit boob pending	Brian Test	Credit Book	05/10/2023, 12:53 PM	\$0.00	Paid by Credit Book	(i)
	Brian Test	Credit Book (i)	05/10/2023, 12:51 PM	\$0.00	Credit Book Adjustment	(i)
Credit boog MorG	Brian Test Ker Ker (i)	Open Registration Fee for Credit... (i)	05/10/2023, 12:19 PM	\$5.00 (i)	Paid / Cleared	(▼)
Credit boog MorG	Brian Test Ker Ker (i)	Credit Book	05/10/2023, 12:19 PM	\$0.00	Paid by Credit Book	(i)
Credit boog MorG	Brian Test	Open Registration Fee for Credit... (i)	05/10/2023, 12:05 PM	\$0.00 (i)	Paid by other means	
Credit boog MorG	Brian Test	Credit Book	05/10/2023, 12:05 PM	\$5.00	Paid by Credit Book	(i)
Credit boog MorG	Brian Test	Open Registration Fee for Credit... (i)	05/10/2023, 11:15 AM	\$3.00 (i)	Paid / Cleared	(▼)
Credit boog MorG	Brian Test	Credit Book	05/10/2023, 11:15 AM	\$2.00	Paid by Credit Book	(i)
Credit boog MorG	Brian Test	Open Registration Fee for Credit... (i)	05/10/2023, 11:02 AM	\$5.00 (i)	Paid / Cleared	(▼)
Credit book M&G	Brian Test Third Third (i)	Open Registration Fee for Credit... (i)	05/10/2023, 10:18 AM	\$5.00 (i)	Paid / Cleared	(▼)

Fig. 4.2.2.1.5. Payment Log with full Mixed payment



Event :	Player :	Description :	Date and Time ▲	Amount :	Status :	Actions
Credit boob pending	Brian Test	Credit Book	05/10/2023, 12:53 PM	\$0.00	Paid by Credit Book	(i)
	Brian Test	Credit Book (i)	05/10/2023, 12:51 PM	\$0.00	Credit Book Adjustment	(i)
Credit boog MorG	Brian Test Ker Ker (i)	Open Registration Fee for Credit... (i)	05/10/2023, 12:19 PM	\$5.00 (i)	Paid / Cleared	(▼)
Credit boog MorG	Brian Test Ker Ker (i)	Credit Book	05/10/2023, 12:19 PM	\$0.00	Paid by Credit Book	(i)
Credit boog MorG	Brian Test	Open Registration Fee for Credit... (i)	05/10/2023, 12:05 PM	\$0.00 (i)	Paid by other means	
Credit boog MorG	Brian Test	Credit Book	05/10/2023, 12:05 PM	\$5.00	Paid by Credit Book	(i)
Credit boog MorG	Brian Test	Open Registration Fee for Credit... (i)	05/10/2023, 11:15 AM	\$3.00 (i)	Paid / Cleared	(▼)
Credit boog MorG	Brian Test	Credit Book	05/10/2023, 11:15 AM	\$2.00	Amount Paid with Credit Card: \$3.00 Amount Paid with Credit Book: \$2.00	
Credit boog MorG	Brian Test	Open Registration Fee for Credit... (i)	05/10/2023, 11:02 AM	\$5.00 (i)	Paid / Cleared	(▼)
Credit boog MorG	Brian Test	Credit Book	05/10/2023, 11:02 AM	\$0.00	Paid by Credit Book	(i)
Credit book M&G	Brian Test Third Third (i)	Open Registration Fee for Credit... (i)	05/10/2023, 10:18 AM	\$5.00 (i)	Paid / Cleared	(▼)
Credit book M&G	Brian Test Third Third (i)	Credit Book	05/10/2023, 10:18 AM	\$0.00	Paid by Credit Book	(i)
Credit book M&G	Brian Test	Open Registration Fee for Credit... (i)	05/10/2023, 10:15 AM	\$0.00 (i)	Paid by other means	
Credit book M&G	Brian Test	Credit Book	05/10/2023, 10:15 AM	\$5.00	Paid by Credit Book	(i)
Credit book M&G	Brian Test	Credit Book	05/10/2023, 10:11 AM	\$0.00	Paid by Credit Book	(i)

Fig. 4.2.2.1.6. Tooltip payment with full Credit Card details, including the amount paid with Credit Card and Credit Book

Person 1
Person 2

Date

Event :	Player :	Description :	Date and Time ▲	Amount :	Status :	Actions
Credit boob pending	Brian Test	Credit Book	05/10/2023, 12:53 PM	\$0.00	Paid by Credit Book	ⓘ
	Brian Test	Credit Book ⓘ	05/10/2023, 12:51 PM	\$0.00	Credit Book Adjustment	ⓘ
Credit boog MorG	Brian Test Ker Ker ⓘ	Open Registration Fee for Credit... ⓘ	05/10/2023, 12:19 PM	\$5.00 ⓘ	Paid / Cleared	▼
Credit boog MorG	Brian Test Ker Ker ⓘ	Credit Book	05/10/2023, 12:19 PM	\$0.00	Paid by Credit Book	ⓘ
Credit boog MorG	Brian Test	Open Registration Fee for Credit... ⓘ	05/10/2023, 12:05 PM	\$0.00 ⓘ	Paid by other means	
Credit boog MorG	Brian Test	Credit Book	05/10/2023, 12:05 PM	\$5.00	Paid by Credit Book	ⓘ
Credit boog MorG	Brian Test	Open Registration Fee for Credit... ⓘ	05/10/2023, 11:15 AM	\$3.00 ⓘ	Paid / Cleared	▼
Credit boog MorG	Brian Test	Credit Book	05/10/2023, 11:15 AM	\$2.00	Paid by Credit Book	ⓘ
Credit boog MorG	Brian Test	Open Registration Fee for Credit... ⓘ	05/10/2023, 11:02 AM	\$5.00 ⓘ	Paid / Cleared	▼
Credit boog MorG	Brian Test	Credit Book	05/10/2023, 11:02 AM	\$0.00	Paid by Credit Book	ⓘ
Credit book M&G	Brian Test Third Third ⓘ	Open Registration Fee for Credit... ⓘ	05/10/2023, 10:18 AM	\$5.00 ⓘ	Paid / Cleared	▼
Credit book M&G	Brian Test Third Third ⓘ	Credit Book	05/10/2023, 10:18 AM	\$0.00	Paid by Credit Book	ⓘ
Credit book M&G	Brian Test	Open Registration Fee for Credit... ⓘ	05/10/2023, 10:15 AM	\$0.00 ⓘ	Paid by other means	

Fig. 4.2.2.1.7. Payment Log with Credit Book

4.2.2.1.4. Payment log with full Credit Book

Event :	Player :	Description :	Date and Time ▲	Amount :	Status :	Actions
Membership Program Fees	Dave Allison	Credit Book	09/11/2023, 08:02 AM	\$111.00	Paid by Credit Book	▼
Refund	Adelsberger, Connor	Credit Book ⓘ	09/05/2023, 10:17 PM	(\$100.00)	Credit Book Adjustment	ⓘ
CB Event	Connor Adelsberger	Open Registration Fee for CB Tra... ⓘ	09/05/2023, 10:16 PM	\$0.00 ⓘ	Paid by other means	▼
CB Event	Connor Adelsberger	Credit Book	09/05/2023, 10:16 PM	\$100.00	Paid by Credit Book	▼
CB Event	Bert Campinaras	Open Registration Fee for CB Tra... ⓘ	09/05/2023, 10:01 PM	\$50.00 ⓘ	Paid / Cleared	ⓘ
CB Event	Bert Campinaras	Credit Book	09/05/2023, 10:01 PM	\$100.00	Paid by Credit Book	ⓘ

Fig. 4.2.2.1.8. Payment Log with Full Credit Book

Event :	Player :	Description :	Date and Time ▲	Amount :	Status :	Actions
Membership Program Fees	Dave Allison	Credit Book	09/11/2023, 08:02 AM	\$111.00	Paid by Credit Book	▼
Refund	Adelsberger, Connor	Credit Book ⓘ	09/05/2023, 10:17 PM	(\$100.00)	Credit Book Adjustment	ⓘ
CB Event	Connor Adelsberger	Open Registration Fee for CB Tra... ⓘ	09/05/2023, 10:16 PM	\$0.00 ⓘ	Paid by other means	▼
CB Event	Connor Adelsberger	Credit Book	09/05/2023, 10:16 PM	\$100.00	Amount Paid with other: \$0.00 Amount Paid with Credit Book: \$100.00	
CB Event	Bert Campinaras	Open Registration Fee for CB Tra... ⓘ	09/05/2023, 10:01 PM	\$50.00 ⓘ	Paid / Cleared	ⓘ
CB Event	Bert Campinaras	Credit Book	09/05/2023, 10:01 PM	\$100.00	Paid by Credit Book	ⓘ
CB Transfer Test 2	Jim Hauman	Open Registration Fee for CB Tra... ⓘ	09/05/2023, 09:55 PM	\$50.00	Transfer In ⓘ	▼

Fig. 4.2.2.1.9. Tooltip payment with full Credit Book, including the amount paid with Credit Card and Credit Book

Person 1
Person 2

Date

Event :	Player :	Description :	Date and Time ▲	Amount :	Status :	Actions
Membership Program Fees	Dave Allison	Credit Book	09/11/2023, 08:02 AM	\$111.00	Paid by Credit Book	▼
Refund	Adelsberger, Connor	Credit Book ⓘ	09/05/2023, 10:17 PM	(\$100.00)	Credit Book Adjustment	ⓘ
CB Event	Connor Adelsberger	Open Registration Fee for CB Tra... ⓘ	09/05/2023, 10:16 PM	\$0.00 ⓘ	Paid by other means	▼
CB Event	Connor Adelsberger	Credit Book	09/05/2023, 10:16 PM	\$100.00	Paid by Credit Book	▼
CB Event	Bert Campinaras	Open Registration Fee for CB Tra... ⓘ	09/05/2023, 10:01 PM	\$50.00 ⓘ	Paid / Cleared	ⓘ
CB Event	Bert Campinaras	Credit Book	09/05/2023, 10:01 PM	\$100.00	Paid by Credit Book	ⓘ

Fig. 4.2.2.1.10. Payment Log with Credit Book

4.2.2.1.6. Tooltip payment for Credit Book Adjustment

Event :	Player :	Description :	Date and Time ▲	Amount :	Status :	Actions
	Brian Test	Credit Book ⓘ	05/10/2023, 03:51 PM	\$0.00	Credit Book Adjustment	ⓘ
	Brian Test	Credit Book ⓘ	05/10/2023, 03:35 PM	\$5.00	Credit Book Adjustment	ⓘ
	Brian Test	Credit Book ⓘ	05/10/2023, 03:33 PM	\$0.00	Credit Book Adjustment	ⓘ
	Brian Test	Credit Book ⓘ	05/10/2023, 03:33 PM	\$0.00	Credit Book Adjustment	ⓘ
	Brian Test	Credit Book ⓘ	05/10/2023, 03:32 PM	\$5.00	Credit Book Adjustment	ⓘ
Membership Program Fees	Brian Test	Membership Program Fees	05/10/2023, 01:46 PM	\$1.00	Paid by Credit Book	ⓘ
Membership Program Fees	Brian Test	Credit Book	05/10/2023, 01:46 PM	\$1.00	Paid by Credit Book	ⓘ
Membership Program Fees	Brian Test	Membership Program Fees	05/10/2023, 01:24 PM	\$3.00 ⓘ	Paid / Cleared	▼
Membership Program Fees	Brian Test	Credit Book	05/10/2023, 01:24 PM	\$2.00	Paid by Credit Book	ⓘ
Credit book pending	Brian Test	Open Registration Fee for Credit... ⓘ	05/10/2023, 01:04 PM	\$0.00 ⓘ	Paid by other means	ⓘ

Fig. 4.2.2.1.11. No actions available for Credit Book Adjustments transactions

4.2.2.1.7. Transfer Registration Logs

Date

Event :	Player :	Description :	Date and Time ▲	Amount :	Status :	Actions
Transfer reg 1	Benjamin Al-Khaffaf	Credit Book	05/16/2023, 01:53 PM	\$80.00	Paid by Credit Book	ⓘ
Transfer reg 1	Benjamin Al-Khaffaf	Open Registration Fee for Transf... ⓘ	05/16/2023, 10:57 AM	\$2.00 ⓘ	Paid / Cleared	▼
Transfer reg 1	Benjamin Al-Khaffaf	Credit Book	05/16/2023, 10:57 AM	\$10.00	Paid by Credit Book	ⓘ
Refund	Adam Sailor	Credit Book ⓘ	05/15/2023, 03:47 PM	(\$5.00)	Credit Book Adjustment	ⓘ
Transfer reg 1	Adam Sailor	Open Registration Fee for Transf... ⓘ	05/15/2023, 03:47 PM	(\$5.00)	Refunded	ⓘ
Transfer reg 2	Adam Sailor	Open Registration Fee for Transf... ⓘ	05/15/2023, 03:47 PM	\$5.00	Transfer In ⓘ	▼
Transfer reg 1	Adam Sailor	Open Registration Fee for Transf... ⓘ	05/15/2023, 03:47 PM	(\$5.00)	Transfer Out ⓘ	ⓘ
Transfer reg 1	Adam Sailor	Open Registration Fee for Transf... ⓘ	05/15/2023, 03:41 PM	\$10.00 ⓘ	Paid / Cleared	ⓘ
Transfer reg 1	Adam Sailor	Credit Book	05/15/2023, 03:41 PM	\$0.00	Paid by Credit Book	ⓘ
Refund	Brian Test	Credit Book ⓘ	05/15/2023, 03:29 PM	(\$5.00)	Credit Book Adjustment	ⓘ
Transfer reg 1	Brian Test	Open Registration Fee for Transf... ⓘ	05/15/2023, 03:29 PM	(\$5.00)	Refunded	ⓘ
Transfer reg 2	Brian Test	Open Registration Fee for Transf... ⓘ	05/15/2023, 03:29 PM	\$5.00	Transfer In ⓘ	▼
Transfer reg 1	Brian Test	Open Registration Fee for Transf... ⓘ	05/15/2023, 03:29 PM	(\$5.00)	Transfer Out ⓘ	ⓘ
Transfer reg 1	Brian Test	Open Registration Fee for Transf... ⓘ	05/15/2023, 03:19 PM	\$5.00 ⓘ	Paid / Cleared	ⓘ
Transfer reg 1	Brian Test	Credit Book	05/15/2023, 03:19 PM	\$5.00	Paid by Credit Book	ⓘ

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Fig. 4.2.2.1.11. Showcasing Transfer Registration logic based on logs

4.2.2.1.8. Refunded Logs

Credit book - refund - no CB	Brian Test	Credit Book	05/11/2023, 04:35 PM	\$2.00	Paid by Credit Book	ⓘ
Credit book - refund - no CB	Brian Test	Open Registration Fee for Credit... ⓘ	05/11/2023, 04:12 PM	(\$1.00)	Refunded	ⓘ
Credit book - refund - no CB	Brian Test	Open Registration Fee for Credit... ⓘ	05/11/2023, 04:11 PM	\$3.00 ⓘ	Paid / Cleared	ⓘ
Credit book - refund - no CB	Brian Test	Credit Book	05/11/2023, 04:11 PM	\$3.00	Paid by Credit Book	ⓘ
Credit book - refund - no CB	Adam Sailor	Open Registration Fee for Credit... ⓘ	05/11/2023, 04:06 PM	(\$3.00)	Refunded	ⓘ
Credit book - refund - no CB	Adam Sailor	Open Registration Fee for Credit... ⓘ	05/11/2023, 04:06 PM	\$3.00 ⓘ	Paid / Cleared	ⓘ
Credit book - refund - no CB	Adam Sailor	Credit Book	05/11/2023, 04:06 PM	\$3.00	Paid by Credit Book	ⓘ
Credit book - refund - no CB	Adam Sailor	Open Registration Fee for Credit... ⓘ	05/11/2023, 04:01 PM	\$6.00 ⓘ	Paid / Cleared	▼
Credit book - refund - no CB	Adam Sailor	Credit Book	05/11/2023, 04:01 PM	\$0.00	Paid by Credit Book	ⓘ
Credit book - refund - no CB	Adam Sailor	Open Registration Fee for Credit... ⓘ	05/11/2023, 03:56 PM	(\$6.00)	Refunded	ⓘ
Credit book - refund - no CB	Adam Sailor	Open Registration Fee for Credit... ⓘ	05/11/2023, 03:56 PM	\$6.00 ⓘ	Paid / Cleared	ⓘ
Credit book - refund - no CB	Adam Sailor	Credit Book	05/11/2023, 03:56 PM	\$0.00	Paid by Credit Book	ⓘ

HELP ⓘ

Fig. 4.2.2.1.12. Showcasing a refunded log

4.2.2.1.9. Tooltip for Refunded log

Date

Credit book - refund - no CB	Brian Test	Open Registration Fee for Credit...	(i)	05/11/2023, 04:11 PM	\$3.00 (i)	Paid / Cleared	(i)	
Credit book - refund - no CB	Brian Test	Credit Book		05/11/2023, 04:11 PM	\$3.00	Paid by Credit Book	(i)	
Credit book - refund - no CB	Adam Sailor	Open Registration Fee for Credit...	(i)	05/11/2023, 04:06 PM	(\$3.00)	Refunded	(i)	
Credit book - refund - no CB	Adam Sailor	Open Registration Fee for Credit...	(i)	05/11/2023, 04:06 PM	\$3.00 (i)	Paid / Cleared	(i)	
Credit book - refund - no CB	Adam Sailor	Credit Book		05/11/2023, 04:06 PM	\$3.00	Paid by Credit Book	(i)	
Credit book - refund - no CB	Adam Sailor	Open Registration Fee for Credit...	(i)	05/11/2023, 04:01 PM	\$6.00 (i)	Paid / Cleared	(i)	
Credit book - refund - no CB	Adam Sailor	Credit Book		05/11/2023, 04:01 PM	\$0.00	Paid by Credit Book	(i)	
Credit book - refund - no CB	Adam Sailor	Open Registration Fee for Credit...	(i)	05/11/2023, 03:56 PM	(\$6.00)	Refunded	(i)	
Credit book - refund - no CB	Adam Sailor	Open Registration Fee for Credit...	(i)	05/11/2023, 03:56 PM	\$6.00 (i)	Paid / Cleared	Approved by: Cristian Pirvu (i)	
Credit book - refund - no CB	Adam Sailor	Credit Book		05/11/2023, 03:56 PM	\$0.00	Paid by Credit Book	(i)	
Refund	Adam Sailor	Credit Book (i)		05/11/2023, 03:55 PM	(\$0.00)	Credit Book Adjustment	(i)	

Fig. 4.2.2.1.13. Showcasing a refunded log - additional details

4.2.2.2. Refund

We have established a clear hierarchy for processing refunds to ensure transparency and efficiency in financial transactions. This hierarchy is designed to prioritize the most convenient and user-friendly methods for users while maintaining financial accuracy.

At the top of this priority list is the **Credit Book** balance. When a user has paid using Credit Book, these credits will be given the highest priority for processing refunds. This means that if a user has credits in their Credit Book, any eligible refunds will be applied from this virtual balance before considering other refund methods.

Following the Credit Book in our refund priority hierarchy is the **Credit Card**. Here the system will proceed to process the refund using the credit card associated with the user's account.

By establishing this clear refund priority system, we aim to streamline the refund process. Users can benefit from the convenience of having their available credits used first, minimizing the need for complex financial transactions, while ensuring a seamless experience when requesting refunds within GolfGenius. This approach not only simplifies financial management but also enhances user satisfaction by offering them control and flexibility in managing their balances and refunds.

4.2.2.2.1. Refund credit card payment

1. We have a credit card payment of \$100

Person 1
Person 2

Date

Card Authorization							
Event :	Player :	Description :	Date and Time ▲	Amount :	Status :	Actions	
Credit Book Test 1	Jack Daniels	Credit Book	08/03/2023, 09:39 PM	\$200.00	Paid by Credit Book	▼	
Credit Book Test 1	Juan Valdez	Open Registration Fee for Credit... ⓘ	08/03/2023, 04:09 PM	\$100.00	Paid / Cleared	▼	
Credit Book Test 1	Ashley Dixon	Open Registration Fee for Credit... ⓘ	08/03/2023, 12:25 PM	\$200.00	Paid / Cleared	▼	
Credit Book Test 1	Blaise Fernandez	Open Registration Fee for Credit... ⓘ	08/02/2023, 11:07 PM	\$150.00 ⓘ	Paid / Cleared	 ⓘ	
Credit Book Test 1	Blaise Fernandez	Credit Book	08/02/2023, 11:07 PM	\$50.00	Paid by Credit Book	 ⓘ	
Pending Reg Test	Charlee Dixon	Open Registration Fee for Pending... ⓘ	08/02/2023, 10:21 PM	\$100.00 ⓘ	Card Authorization	▼	
Pending Reg Test	Charlee Dixon	Credit Book	08/02/2023, 10:21 PM	\$0.00	Paid by Credit Book	 ⓘ	
Pending Reg Test	Ashley Dixon	Open Registration Fee for Pending... ⓘ	08/02/2023, 04:21 PM	\$100.00 ⓘ	Paid / Cleared	▼	
Waitlist Test	Ashley Dixon	Open Registration Fee for Waitli... ⓘ	08/02/2023, 04:19 PM	\$100.00 ⓘ	Paid / Cleared	▼	
Waitlist Test	Ashley Dixon	Credit Book	08/02/2023, 04:19 PM	\$0.00	Paid by Credit Book	 ⓘ	
Pending Reg Test	Ashley Dixon	Credit Book	08/02/2023, 04:21 PM	\$0.00	Paid by Credit Book	 ⓘ	
Refund	Adelsberger, Connor	Credit Book ⓘ	05/29/2023, 06:23 AM	(\$77.00)	Credit Book Adjustment	 ⓘ	

Fig. 4.2.2.2.1. Refund CC flow - target transaction

2. Click on Refund

Paid / Cleared

ⓘ Paid / Cleared ⓘ

Paid by Credit Book ⓘ

ⓘ Card Auth Refund ⚡ ⓘ

Paid by Credit Book ⓘ

H

Fig. 4.2.2.2.2. Refund CC flow - Refund action

3. You can see the amount paid using the credit card

Person 1
Person 2

Date

The screenshot shows a 'Process Refund' dialog box overlaid on a 'Payments Center' interface. The dialog box contains the following fields:

- Registar Name:** Charlee Dixon
- Registar Email:** ken+charlee@golfgenius.com
- Registration Option:** Fee
- Amount paid with Credit Card:** \$100.00
- Amount paid with Credit Book:** \$0.00
- Refund:** Full Amount
- Refund to:** The original source of payment
- Refund Reason:** (empty text area)
- Registered Players:** Dixon, Charlee
- Approve Refund** button

A red box highlights the amount paid with a credit card (\$100.00) and a dashed red box highlights the refund options.

Fig. 4.2.2.2.3. Refund CC flow - Refund popup - detailed amounts

4. Refund to credit card, will take only the Amount Paid with the Credit Card and refund the entire amount to the credit card

Person 1
Person 2

Date

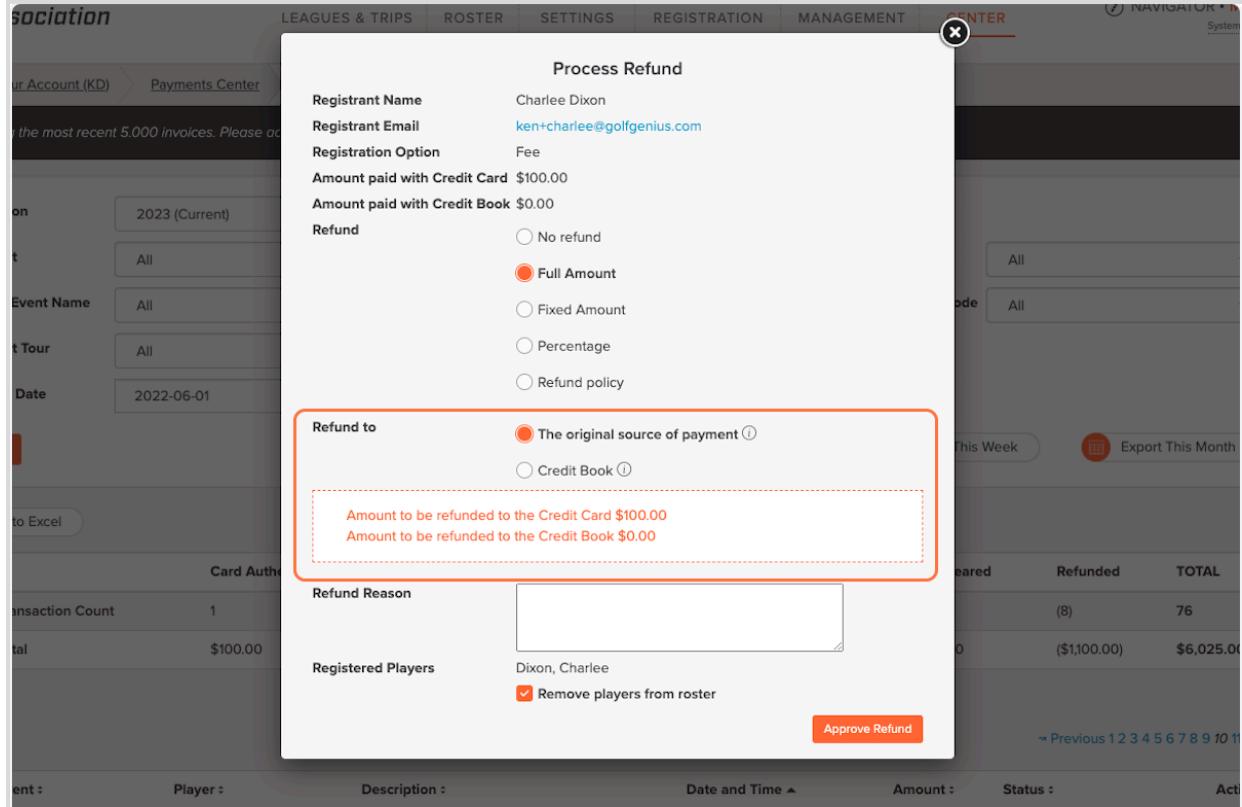


Fig. 4.2.2.2.4. Refund CC flow - Refund popup - Refund to options (source of payment, or Credit Book)

5. Refund to credit book will take only the Amount Paid with the Credit Card and refund to the golfer's credit book balance

Person 1
Person 2

Date

Process Refund

Registrant Name: Charlee Dixon
Registrant Email: ken+charlee@golfgenius.com
Registration Option: Fee
Amount paid with Credit Card: \$100.00
Amount paid with Credit Book: \$0.00

Refund:

- No refund
- Full Amount
- Fixed Amount
- Percentage
- Refund policy

Refund to:

- The original source of payment ⓘ
- Credit Book ⓘ

Amount to be refunded to the Credit Book \$100.00

Refund Reason:

Registered Players: Dixon, Charlee
 Remove players from roster

Approve Refund

Player	Description	Date and Time	Amount	Status
1	Jack Daniels	Credit Book	08/03/2023, 09:39 PM	\$200.00 Paid by Credit Book

Fig. 4.2.2.2.5. Refund CC flow - Refund popup - Refund to Credit Book

6. No refund option will not refund any money to the golfer

Person 1
Person 2

Date

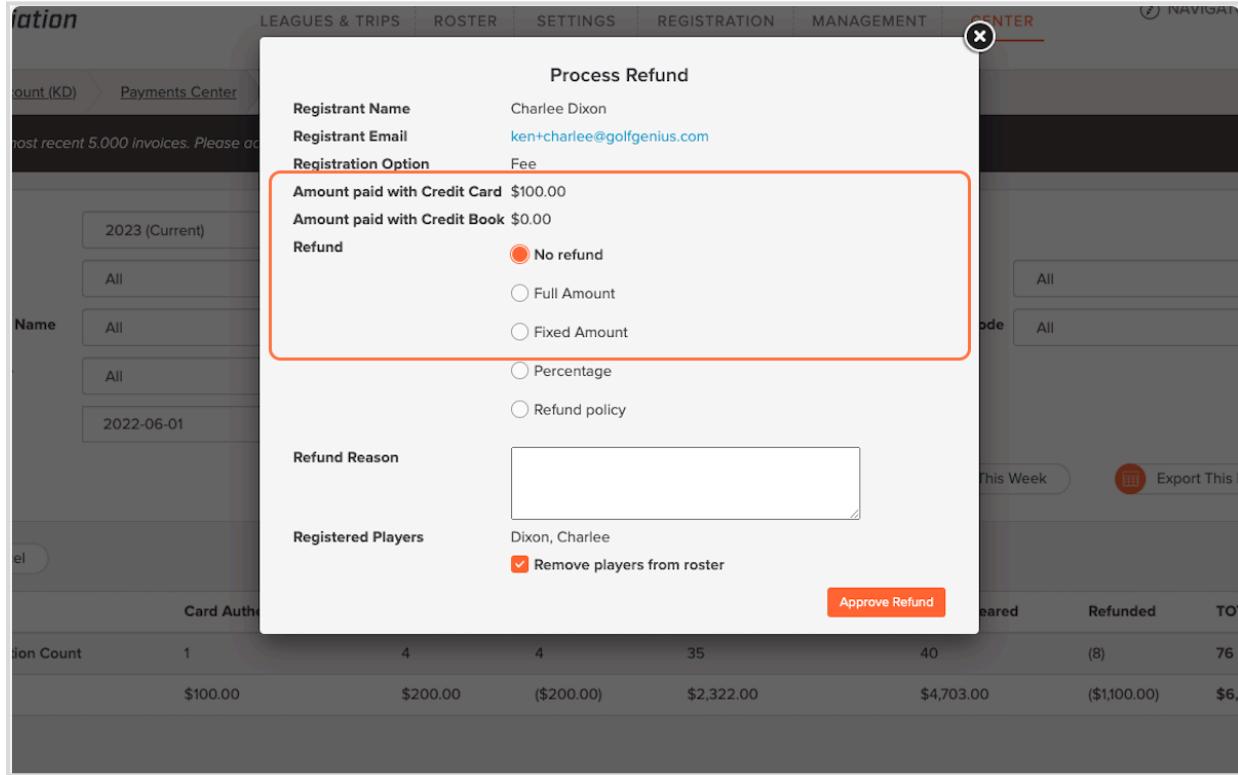


Fig. 4.2.2.2.6. Refund CC flow - Refund popup - Amount to be refunded options: no refund

7. The full amount option will refund the full amount of money to the golfer

Person 1
Person 2

Date

Process Refund

Registrant Name: Charlee Dixon
Registrant Email: ken+charlee@golfgenius.com
Registration Option: Fee
Amount paid with Credit Card: \$100.00
Amount paid with Credit Book: \$0.00

Refund:

No refund
 Full Amount
 Fixed Amount
 Percentage
 Refund policy

Refund to:

The original source of payment ⓘ
 Credit Book ⓘ

Amount to be refunded to the Credit Card \$100.00
Amount to be refunded to the Credit Book \$0.00

Refund Reason:

Registered Players: Dixon, Charlee
 Remove players from roster

Approve Refund

Fig. 4.2.2.2.7. Refund CC flow - Refund popup - Amount to be refunded options: full amount

8. The fixed amount option will refund a fixed amount of money to the golfer

Person 1
Person 2

Date

The screenshot shows a 'Process Refund' dialog box overlaid on a 'Payments Center' interface. The dialog box contains the following fields:

- Registar Name:** Charlee Dixon
- Registar Email:** ken+charlee@golfgenius.com
- Registration Option:** Fee
- Amount paid with Credit Card:** \$100.00
- Amount paid with Credit Book:** \$0.00
- Refund:** No refund Full Amount
- Refund to:** The original source of payment ⓘ Credit Book ⓘ
- Amount to be refunded to the Credit Card:** \$50.00
- Amount to be refunded to the Credit Book:** \$0.00
- Refund Reason:** (empty text area)
- Registered Players:** Dixon, Charlee Remove players from roster
- Approve Refund** button

The 'Fixed Amount' input field is highlighted with a red border.

Fig. 4.2.2.2.8. Refund CC flow - Refund popup - Amount to be refunded options: fixed amount

9. The percentage amount option will refund a percentage amount of money to the golfer

Person 1
Person 2

Date

The screenshot shows a 'Process Refund' dialog box overlaid on a 'Payments Center' interface. In the dialog, under 'Refund', the 'Percentage' option is selected with a value of 10%. Below this, there are two radio button options: 'The original source of payment' (selected) and 'Credit Book'. A tooltip at the bottom of the dialog box displays the amounts: 'Amount to be refunded to the Credit Card \$10.00' and 'Amount to be refunded to the Credit Book \$0.00'. The background shows a table of transaction history with columns: Transaction ID, Player, Description, Date and Time, Amount, Status, and Actions.

Fig. 4.2.2.2.9. Refund CC flow - Refund popup - Amount to be refunded options: percentage

10. After the refund, the tooltip will show a successful: Refund Issues

Person 1
Person 2

Date

→ Previous 1 2 3 4 5 6 7 8 9 10 11 Next →		
Amount	Status	Actions
\$200.00	Paid by Credit Book	▼
\$100.00	Paid / Cleared	▼
\$200.00	Paid / Cleared	▼
\$150.00 ⓘ	Paid / Cleared	ⓘ
\$50.00	Paid by Credit Book	Refund Issued
\$100.00 ⓘ	Card Authorization	ⓘ
\$0.00	Paid by Credit Book	ⓘ
\$100.00 ⓘ	Paid / Cleared	▼
\$100.00 ⓘ	Paid / Cleared	—

HELP

Fig. 4.2.2.2.10. Refund CC flow - Transaction refunded additional details

4.2.2.2.2. Refund mixed payment

1. We have a mixed payment of \$100 paid with credit card and \$50 paid with Credit Book

Person 1
Person 2

Date

Event :	Player :	Description :	Date and Time ▲	Amount :	Status :	Actions
CB Test 4	Juan Valdez	Credit Book	08/24/2023, 02:03 PM	\$0.00	Paid by Credit Book	ⓘ
Refund	Dixon3, Ken	Credit Book ⓘ	08/24/2023, 01:58 PM	(\$1.80)	Credit Book Adjustment	ⓘ
CB Test 3	Ken Dixon3	Open Registration Fee for CB Tes... ⓘ	08/24/2023, 01:58 PM	(\$180.00)	Refunded	ⓘ
CB Test 3	Ken Dixon3	Open Registration Fee for CB Tes... ⓘ	08/24/2023, 01:58 PM	\$200.00 ⓘ	Paid / Cleared	ⓘ
CB Test 3	Charlee Dixon	Open Registration Fee for CB Tes... ⓘ	08/24/2023, 01:53 PM	\$150.00 ⓘ	Paid / Cleared	▼
CB Test 3	Charlee Dixon	Credit Book	08/24/2023, 01:53 PM	\$50.00	Paid by Credit Book	ⓘ
CB Test 3	Juan Valdez	Open Registration Fee for CB Tes... ⓘ	08/24/2023, 12:43 PM	\$150.00 ⓘ	Paid / Cleared	▼
CB Test 3	Juan Valdez	Credit Book	08/24/2023, 12:43 PM	\$50.00	Amount Paid with Credit Card: \$150.00 Amount Paid with Credit Book: \$50.00	ⓘ
Refund	Adeisberger, Connor	Credit Book ⓘ	08/24/2023, 12:40 PM	(\$176.00)	Credit Book Adjustment	ⓘ
CB Test 3	Connor Adeisberger	Open Registration Fee for CB Tes... ⓘ	08/24/2023, 12:34 PM	\$0.00 ⓘ	Paid by other means	▼
CB Test 3	Connor Adeisberger	Credit Book	08/24/2023, 12:34 PM	\$200.00	Paid by Credit Book	▼
CB Test 3	Dave Allison ⓘ	Open Registration Fee for CB Tes... ⓘ	08/24/2023, 04:41 AM	\$0.00 ⓘ	Paid by other means	▼
CB Test 3	Dave Allison ⓘ	Credit Book	08/24/2023, 04:41 AM	\$200.00	Paid by Credit Book	▼
CB Test 3	Andrei Vasiluta	Open Registration Fee for CB Tes... ⓘ	08/24/2023, 04:38 AM	\$200.00	Paid by other means	
CB Test 3	Andrei Vasiluta	Open Registration Fee for CB Tes... ⓘ	08/24/2023, 04:26 AM	\$200.00	Paid by other means	

Fig. 4.2.2.11. Refund mixed payment flow - Details of the target transaction to be refunded

2. Click on Refund

Person 1
Person 2

Date

Amount :	Status :	Actions
\$0.00	Paid by Credit Book	(i)
(\$1.80)	Credit Book Adjustment	(i)
(\$180.00)	Refunded	(i)
\$200.00 (i)	Paid / Cleared	(i)
\$150.00 (i)	Paid / Cleared	<div style="border: 1px solid #ccc; padding: 5px; display: inline-block;">Refund</div>
\$50.00	Paid by Credit Book	Transfer Registration (i)
\$150.00 (i)	Paid / Cleared	<div style="border: 1px solid #ccc; padding: 5px; display: inline-block;">Print Receipt</div>
\$50.00	Paid by Credit Book	(i)
(\$176.00)	Credit Book Adjustment	(i)
\$0.00 (i)	Paid by other means	<div style="border: 1px solid #ccc; padding: 5px; display: inline-block;">(▼)</div>

H
E

Fig. 4.2.2.12. Refund mixed payment flow - Refund option

3. Amount paid by golfer using Credit Card and Credit Book

Person 1
Person 2

Date

The screenshot shows a 'Process Refund' dialog box overlaid on a larger application interface. The dialog box contains the following fields:

- Registar Name:** Juan Valdez
- Registar Email:** ken+juan@golfgenius.com
- Registration Option:** Fee
- Amount paid with Credit Card:** \$150.00
- Amount paid with Credit Book:** \$50.00
- Refund:** Full Amount (highlighted with a red box)
- Refund to:** The original source of payment (highlighted with a red box)
- Refund Reason:** (empty text area)
- Registered Players:** Valdez, Juan
- Refund Options:** Remove players from roster
- Approve Refund** button

The background application shows a transaction history with one entry:

Transaction Count	Refunded	TOTAL
1	(8)	76
0	(\$1,100.00)	\$6,025.00

Fig. 4.2.2.2.13. Refund mixed payment flow - Amount paid details (CC / Credit Book)

4. No refund option will not refund any money to the golfer

This screenshot is identical to Fig. 4.2.2.2.13, but the 'Refund' section shows a different selection:

- Refund:** No refund (highlighted with a red box)
- Refund Options:** Full Amount

The rest of the dialog box and the background application interface are the same as in Fig. 4.2.2.2.13.

Person 1
Person 2

Date

Fig. 4.2.2.2.14. Refund mixed payment flow - Refund options: no refund

5. The full amount option will refund the full amount of money to the golfer

The screenshot shows a software interface for processing a refund. At the top, it displays the golfer's information: Juan Valdez, ken+juan@golfgenius.com, and a fee of \$150.00. Below this, there are four radio button options for refunding: 'No refund', 'Full Amount' (which is selected and highlighted with a red border), 'Fixed Amount', 'Percentage', and 'Refund policy'. Under the 'Refund to' section, 'The original source of payment' is selected. A callout box highlights the amounts: 'Amount to be refunded to the Credit Card \$150.00' and 'Amount to be refunded to the Credit Book \$50.00'. The 'Refund Reason' field is empty. In the 'Registered Players' section, Valdez, Juan is listed with a checked checkbox for 'Remove players from roster'. At the bottom right, there is a large orange 'Approve Refund' button.

Fig. 4.2.2.2.15. Refund mixed payment flow - Refund options: full amount; Details of how the \$ will be refunded

6. When a fixed amount refund is initiated, the system follows a specific refund sequence:

- Firstly, it fully refunds the amount paid using the Credit Book balance, ensuring that this source is utilized to its maximum extent
- Once the Credit Book balance has been completely used for the refund, the system then proceeds to refund any remaining amount to the credit card

To illustrate this process with an example: Let's say a golfer has made a total payment of \$200, and a fixed refund amount of \$80 is initiated. In this scenario, the system will first refund \$50 from the golfer's Credit Book balance, and the outstanding amount left, it will be refunded to the credit card., like in the example below.

Person 1
Person 2

Date

The screenshot shows a 'Process Refund' dialog box overlaid on a main application window. The dialog box contains fields for Registrant Name (Juan Valdez), Registrant Email (ken+juan@golfgenius.com), Registration Option (Fee), Amount paid with Credit Card (\$150.00), and Amount paid with Credit Book (\$50.00). Under 'Refund', there are three options: 'No refund' (radio button), 'Full Amount' (radio button), and 'Fixed Amount' (radio button, selected). A dropdown menu shows '\$ 80'. Below this, there are options for 'Percentage' and 'Refund policy'. Under 'Refund to', 'The original source of payment' is selected. A note indicates that the Credit Book takes priority over the Credit Card. The 'Approved' section shows a balance of \$80 and a total of \$6,025.00. The 'Refund Reason' field is empty. The 'Registered Players' section lists 'Valdez, Juan' and has a checked checkbox for 'Remove players from roster'. A red box highlights the 'Fixed Amount' section and the note about the Credit Book taking priority.

Fig. 4.2.2.2.16. Refund mixed payment flow - Refund options: fixed amount; Details of how the \$ will be refunded
- Credit Book takes priority over Credit Card (1)

7. You can't input the value greater than the whole fee

Person 1
Person 2

Date

The screenshot shows a 'Process Refund' dialog box overlaid on a main application window. The dialog box contains the following fields:

- Registrant Name:** Juan Valdez
- Registrant Email:** ken.juan@golfgenius.com
- Registration Option:** Fee
- Amount paid with Credit Card:** \$150.00
- Amount paid with Credit Book:** \$50.00
- Refund:** Fixed Amount: \$ 290 (highlighted with a red box)
- Full Amount
- Percentage
- Refund policy

A tooltip message 'This value can't be greater than \$200.00!' is displayed next to the 'Fixed Amount' input field.

Refund to:

- The original source of payment
- Credit Book

Refund Reason: [Empty text area]

Registered Players: Valdez, Juan

Actions: Remove players from roster

Buttons: Approve Refund

The background application shows a summary table with the following data:

	Refunded	TOTAL
(8)	76	
0	(\$1,100.00)	\$6,025.00

Navigation links at the bottom include: Previous 1 2 3 4 5 6 7 8 9 10 11 Next.

Fig. 4.2.2.2.17. Refund mixed payment flow - Refund options: fixed amount; Details of how the \$ will be refunded
- Credit Book takes priority over Credit Card (2)

8. The percentage amount option will refund a percentage amount of money to the golfer

Person 1
Person 2

Date

The screenshot shows a modal dialog titled "Process Refund". Inside the dialog, the "Refund" section is highlighted with a red box. It contains four options: "No refund" (radio button), "Full Amount" (radio button), "Fixed Amount" (radio button), and "Percentage" (radio button, which is selected). A text input field next to it contains "0" and a percentage sign "%". A tooltip message "This value can't be empty!" is displayed next to the input field. Below the input field, the text "Refund to" is followed by a dropdown menu with two options: "The original source of payment" (selected) and "Credit Book". A dashed red box highlights the "Amount to be refunded to the Credit Card \$150.00" and "Amount to be refunded to the Credit Book \$50.00" text. At the bottom of the dialog, there is a "Refund Reason" text area and a "Registered Players" section listing "Valdez, Juan" with a checked checkbox for "Remove players from roster". A red "Approve Refund" button is at the bottom right. The background of the dialog shows a blurred view of a software interface with various filters and a table of data.

Fig. 4.2.2.18. Refund mixed payment flow - Refund options: percentage

9. We have the option to select where the money will be refunded. The amount to be refunded both to the Credit Card or Credit Book will change in the details area based on the refund and refund to settings

Person 1
Person 2

Date

most recent 5,000 invoices. Please adjust the filters to view the desired results.

2023 (Current)

All

All

All

2022-06-01

Process Refund

Registrant Name: Juan Valdez
Registrant Email: ken+juan@golfgenius.com
Registration Option: Fee
Amount paid with Credit Card: \$150.00
Amount paid with Credit Book: \$50.00

Refund:

- No refund
- Full Amount
- Fixed Amount
- Percentage
- Refund policy

Refund to:

- The original source of payment ⓘ
- Credit Book ⓘ

Amount to be refunded to the Credit Book \$200.00

Refund Reason:

Registered Players: Valdez, Juan

Remove players from roster

Approve Refund

Refund History

Refunded	Refunded	TOTAL
(8)	76	
0	(\$1,100.00)	\$6,025.00

← Previous 1 2 3 4 5 6 7 8 9 10 11 Next →

Status :	Actions
Paid by Credit Book	ⓘ
Credit Book Adjustment	ⓘ

Fig. 4.2.2.2.19. Refund mixed payment flow - Refund to options: original source of payment, or Credit Book

10. The fixed amount on the credit book will refund the balance inputted to the credit book balance

Person 1
Person 2

Date

Process Refund

Registrant Name: Juan Valdez
Registrant Email: ken-juan@golfgenius.com
Registration Option: Fee
Amount paid with Credit Card: \$150.00
Amount paid with Credit Book: \$50.00

Refund:

- No refund
- Full Amount
- Fixed Amount: \$ 190
- Percentage
- Refund policy

Refund to:

- The original source of payment
- Credit Book

Amount to be refunded to the Credit Book \$190.00

Refund Reason:

Registered Players: Valdez, Juan

Approve Refund

Status: Paid by Credit Book

Fig. 4.2.2.2.20. Refund mixed payment flow - Showcasing a full amount refund to Credit Book (initial transaction was a mixed payment)

11. After the refund, the tooltip will show a successful: Refund Issues

Person 1
Person 2

Date

~ Previous 1 2 3 4 5 6 7 8 9 10 11 Next →		
Mount :	Status :	Actions
10.00	Paid by Credit Book	(i)
1.80)	Credit Book Adjustment	(i)
180.00)	Refunded	(i)
100.00 (i)	Paid / Cleared	(i)
50.00 (i)	Paid / Cleared	Refund Issued
50.00	Paid by Credit Book	(i)
50.00 (i)	Paid / Cleared	▼
50.00	Paid by Credit Book	(i)
176.00)	Credit Book Adjustment	(i)

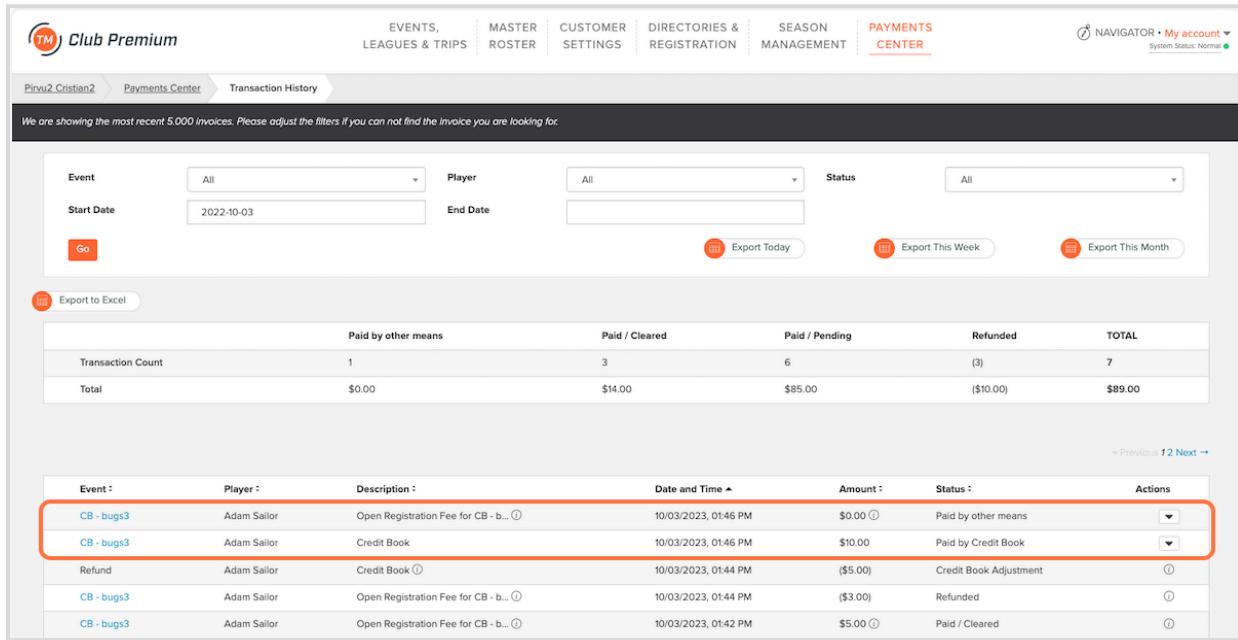
Fig. 4.2.2.2.21. Refund mixed payment flow - Transaction refunded details

4.2.2.2.3. Refund credit book payment

1. We have a credit book payment of \$10

Person 1
Person 2

Date



The screenshot shows the 'Payments Center' section of the Club Premium software. At the top, there are navigation links: EVENTS, LEAGUES & TRIPS, MASTER ROSTER, CUSTOMER SETTINGS, DIRECTORIES & REGISTRATION, SEASON MANAGEMENT, and PAYMENTS CENTER (which is underlined). On the right, there's a 'NAVIGATOR' link and a 'System Status: Normal' indicator.

In the center, there's a search/filter panel with fields for Event (All), Player (All), Status (All), Start Date (2022-10-03), and End Date (empty). Below the search are three export buttons: 'Export Today', 'Export This Week', and 'Export This Month'. A 'Go' button is also present.

A message at the top states: "We are showing the most recent 5,000 invoices. Please adjust the filters if you can not find the invoice you are looking for."

The main area displays a table of transactions:

	Paid by other means	Paid / Cleared	Paid / Pending	Refunded	TOTAL
Transaction Count	1	3	6	(3)	7
Total	\$0.00	\$14.00	\$85.00	(\$10.00)	\$89.00

Below this, another table lists individual transactions:

Event :	Player :	Description :	Date and Time ▲	Amount :	Status :	Actions
CB - bugs3	Adam Sailor	Open Registration Fee for CB - b... ⓘ	10/03/2023, 01:46 PM	\$0.00 ⓘ	Paid by other means	ⓘ
CB - bugs3	Adam Sailor	Credit Book	10/03/2023, 01:46 PM	\$10.00	Paid by Credit Book	ⓘ
Refund	Adam Sailor	Credit Book ⓘ	10/03/2023, 01:44 PM	(\$5.00)	Credit Book Adjustment	ⓘ
CB - bugs3	Adam Sailor	Open Registration Fee for CB - b... ⓘ	10/03/2023, 01:44 PM	(\$3.00)	Refunded	ⓘ
CB - bugs3	Adam Sailor	Open Registration Fee for CB - b... ⓘ	10/03/2023, 01:42 PM	\$5.00 ⓘ	Paid / Cleared	ⓘ

The second and third rows from the top are highlighted with a red box.

Fig. 4.2.2.22. Refund Credit Book payment flow - Target transaction

2. Click on Refund

Person 1
Person 2

Date

Amount	Status	Actions
(\$10.00)		\$89.00
		~ Previous 1 2 Next →
\$0.00 ⓘ	Paid by other means	▼
\$10.00	Paid by Credit Book	▲ Refund
\$5.00)	Credit Book Adjustment	ⓘ
\$3.00)	Refunded	ⓘ
\$5.00 ⓘ	Paid / Cleared	ⓘ
\$5.00	Paid by Credit Book	ⓘ
\$0.00)	Credit Book Adjustment	ⓘ

Fig. 4.2.2.23. Refund Credit Book payment flow - Refund option for the target transaction

3. Amount Paid refers to the amount paid with credit book

Person 1
Person 2

Date

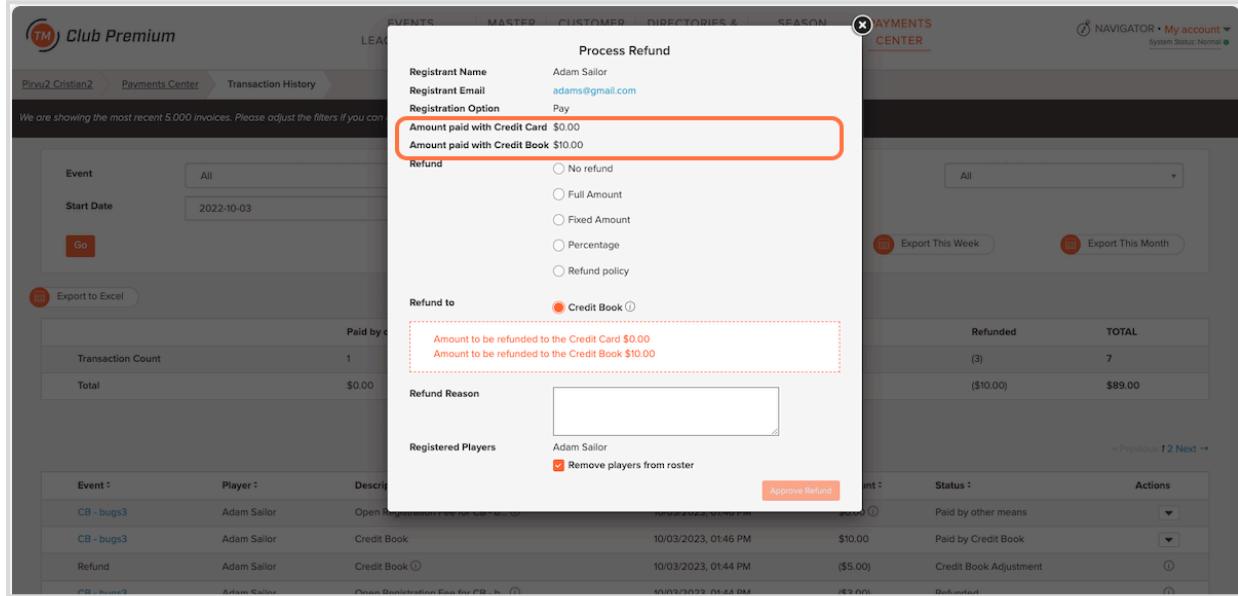


Fig. 4.2.2.24. Refund Credit Book payment flow - Refund popup - Amount breakdown

4. Multiple options of refund

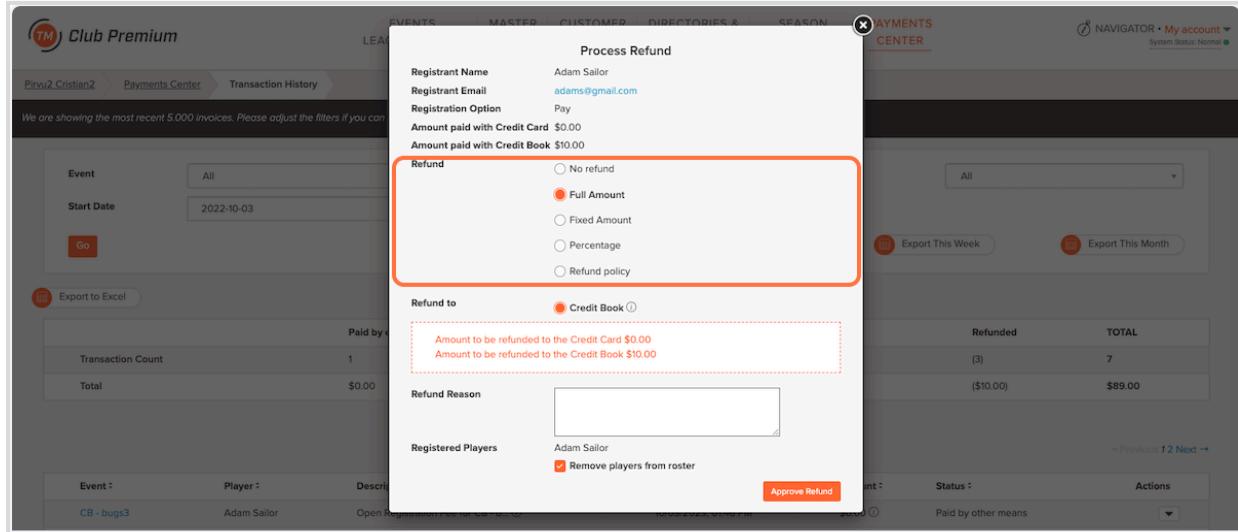


Fig. 4.2.2.25. Refund Credit Book payment flow - Refund popup - Amount to refund options

5. No refund option will not refund any money to the golfer

Person 1
Person 2

Date

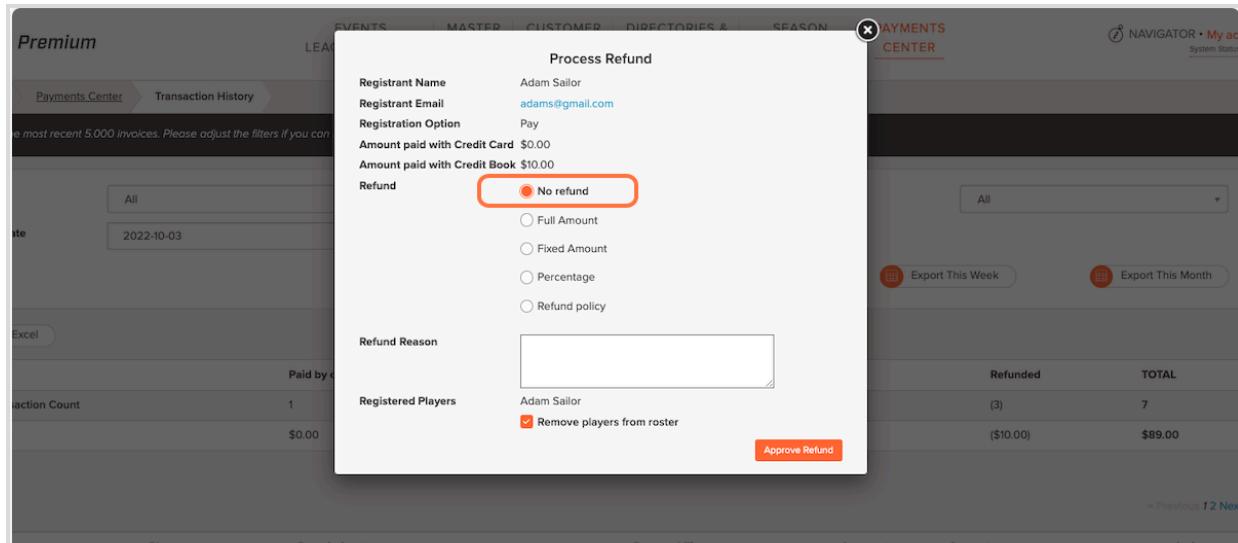


Fig. 4.2.2.26. Refund Credit Book payment flow - Refund popup - Refund options: no refund

6. The fixed amount option will refund a fixed amount of money to the golfer credit book balance

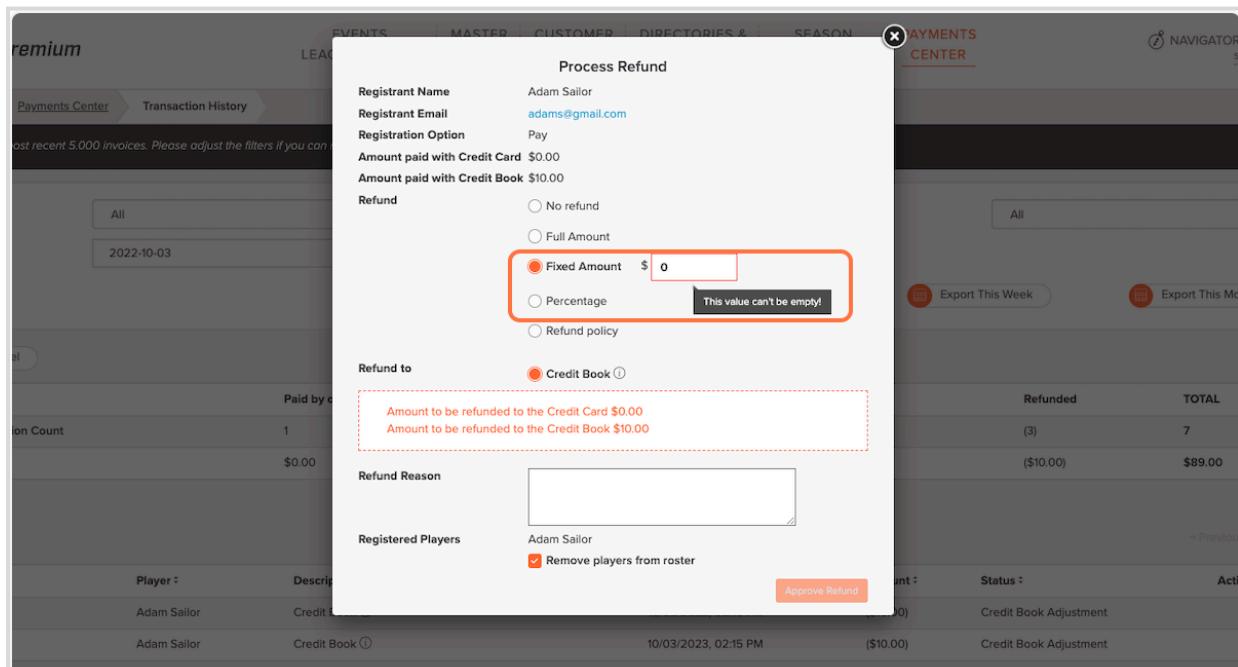


Fig. 4.2.2.27. Refund Credit Book payment flow - Refund popup - Refund options: fixed amount

7. You can't input a values greater than the balance paid

Person 1
Person 2

Date

Process Refund

Name Adam Sailor
Email adams@gmail.com
Option Pay
with Credit Card \$0.00
with Credit Book \$10.00

No refund
 Full Amount
 Fixed Amount \$
 Percentage
 Refund policy
 Credit Book i

This value can't be greater than \$10.00!

to be refunded to the Credit Card \$0.00
to be refunded to the Credit Book \$10.00

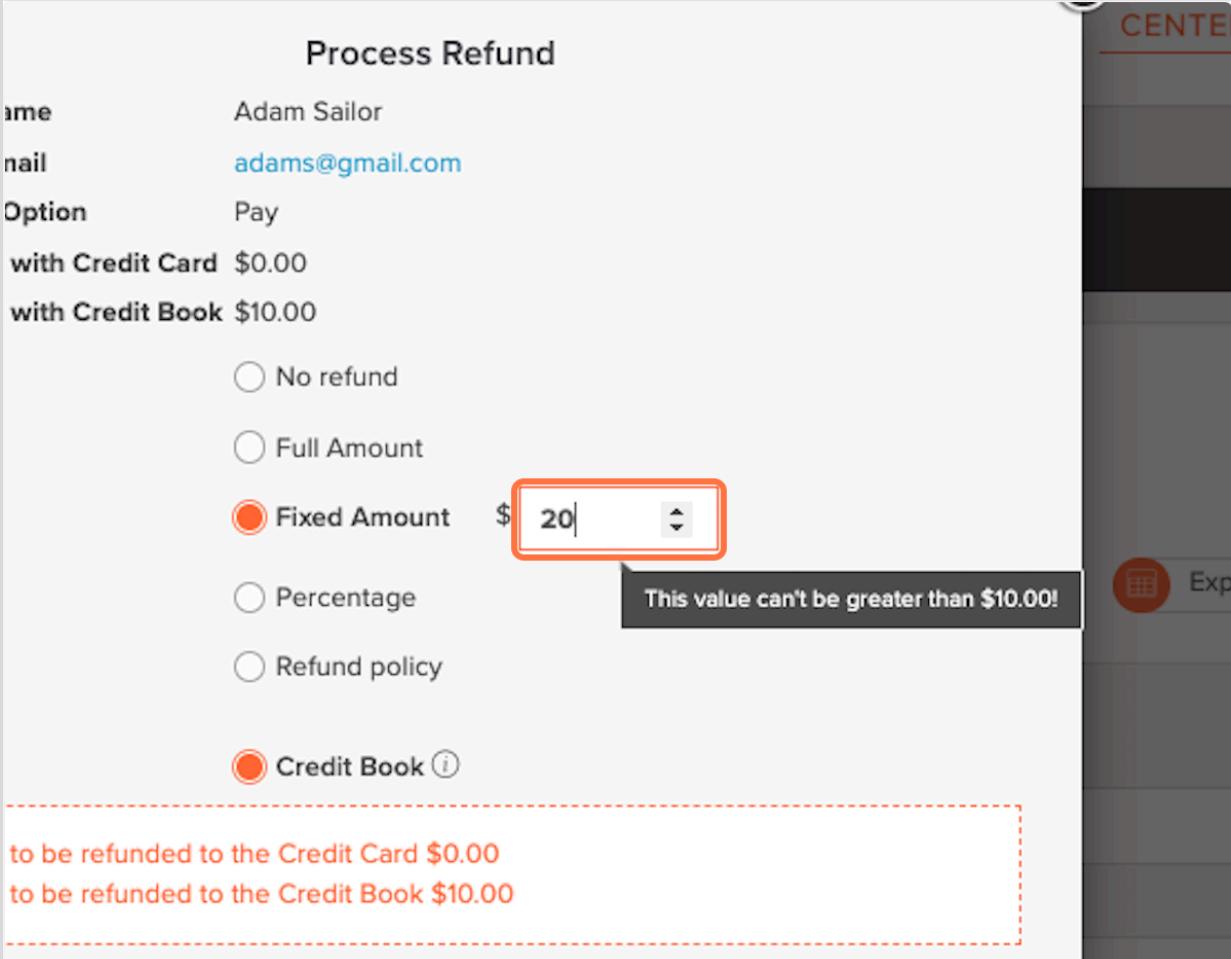


Fig. 4.2.2.28. Refund Credit Book payment flow - Refund popup - Refund options: fixed amount (validators)

8. The full amount option will refund the total amount of money to the golfer

Person 1
Person 2

Date

Process Refund

Registar Name: Adam Sailor
Registar Email: adams@gmail.com
Registration Option: Pay
Amount paid with Credit Card: \$0.00
Amount paid with Credit Book: \$10.00

Refund:

No refund
 Full Amount
 Fixed Amount
 Percentage
 Refund policy

Refund to: Credit Book ⓘ

Amount to be refunded to the Credit Card \$0.00
Amount to be refunded to the Credit Book \$10.00

Refund Reason: [Empty Text Area]

Registered Players: Adam Sailor
 Remove players from roster

Approve Refund

Refunded TO
(3) 7
(\$10.00) \$8

Player : Description Account : Status :
Adam Sailor Credit Book (\$10.00) Credit Book Adjustment

Fig. 4.2.2.29. Refund Credit Book payment flow - Refund popup - Refund options: full amount

9. Refund the entire balance to the Credit Book

Person 1

Person 2

Date

Process Refund

Registrant Name: Adam Sailor
Registrant Email: adams@gmail.com
Registration Option: Pay
Amount paid with Credit Card: \$0.00
Amount paid with Credit Book: \$10.00

Refund:

No refund
 Full Amount
 Fixed Amount
 Percentage
 Refund policy

Refund to: Credit Book i

Amount to be refunded to the Credit Card: \$0.00
Amount to be refunded to the Credit Book: \$10.00

Refund Reason:

Registered Players: Adam Sailor
 Remove players from roster

Approve Refund

Refund Type	Amount	Status
Refund to Credit Book	\$10.00	Paid by Credit Book
Refund to Credit Card	\$0.00	Paid by other means

Fig. 4.2.2.2.30. Refund Credit Book payment flow - Refund popup - Refund to options: Credit Book as the only option available as the transaction was processed through the CB

10. The text in this box will change according with the values in the refund settings

Person 1
Person 2

Date

Process Refund

Registrant Name: Adam Sailor
Registrant Email: adams@gmail.com
Registration Option: Pay
Amount paid with Credit Card: \$0.00
Amount paid with Credit Book: \$10.00

Refund:

- No refund
- Full Amount
- Fixed Amount
- Percentage
- Refund policy

Refund to:

- Credit Book ⓘ

Paid by:

		Refunded
1		(3)
	\$0.00	(\$10.00)

Amount to be refunded to the Credit Card \$0.00
Amount to be refunded to the Credit Book \$10.00

Refund Reason:

Registered Players: Adam Sailor
 Remove players from roster

Approve Refund

Player:	Description	Date	Amount:	Status:
Adam Sailor	Open Registration Fee for CB - b... ⓘ	10/03/2023, 01:40 PM	\$10.00 ⓘ	Paid by other means
Adam Sailor	Credit Book	10/03/2023, 01:46 PM	\$10.00	Paid by Credit Book
Adam Sailor	Credit Book ⓘ	10/03/2023, 01:44 PM	(\$5.00)	Credit Book Adjustment
Adam Sailor	Open Registration Fee for CB - b... ⓘ	10/03/2023, 01:44 PM	(\$3.00)	Refunded
Adam Sailor	Open Registration Fee for CB - b... ⓘ	10/03/2023, 01:42 PM	\$5.00 ⓘ	Paid / Cleared

Fig. 4.2.2.2.31. Refund Credit Book payment flow - Refund popup - Refund to options:
Credit Book - breakdown of the amounts and refund target

11. The initial transaction has been canceled and the balance of \$10 was given to the golfer and marked with Credit Book Adjustment

Person 1
Person 2

Date

The screenshot shows the 'Payments Center' section of the Club Premium software. At the top, there are navigation links: EVENTS, LEAGUES & TRIPS, MASTER ROSTER, CUSTOMER SETTINGS, DIRECTORIES & REGISTRATION, SEASON MANAGEMENT, and PAYMENTS CENTER (which is underlined). On the right, there are links for NAVIGATOR, My account, and System Status.

The main area displays a 'Transaction History' table with the following columns: Event, Player, Status, Go, Export Today, Export This Week, Export This Month, and Export to Excel. The table includes summary rows for Transaction Count and Total.

The detailed transaction log table has columns: Event, Player, Description, Date and Time, Amount, Status, and Actions. A red box highlights three specific transactions:

Event	Player	Description	Date and Time	Amount	Status	Actions
Refund	Adam Sailor	Credit Book	10/03/2023, 02:15 PM	(\$10.00)	Credit Book Adjustment	View
CB - bugs3	Adam Sailor	Open Registration Fee for CB - b...	10/03/2023, 01:46 PM	\$0.00	Paid by other means	View
CB - bugs3	Adam Sailor	Credit Book	10/03/2023, 01:46 PM	\$10.00	Paid by Credit Book	View
Refund	Adam Sailor	Credit Book	10/03/2023, 01:44 PM	(\$5.00)	Credit Book Adjustment	View
CB - bugs3	Adam Sailor	Open Registration Fee for CB - b...	10/03/2023, 01:44 PM	(\$3.00)	Refunded	View
CB - bugs3	Adam Sailor	Open Registration Fee for CB - b...	10/03/2023, 01:42 PM	\$5.00	Paid / Cleared	View
CB - bugs3	Adam Sailor	Credit Book	10/03/2023, 01:42 PM	\$5.00	Paid by Credit Book	View
Refund	Adam Sailor	Credit Book	10/03/2023, 01:37 PM	(\$0.00)	Credit Book Adjustment	View
CB - bugs3	Adam Sailor	Open Registration Fee for CB - b...	10/03/2023, 01:37 PM	(\$2.00)	Refunded	View
CB - bugs3	Adam Sailor	Open Registration Fee for CB - b...	10/03/2023, 01:32 PM	\$4.00	Paid / Cleared	View
CB - bugs3	Adam Sailor	Credit Book	10/03/2023, 01:32 PM	\$0.00	Paid by Credit Book	View

Fig. 4.2.2.32. Refund Credit Book payment flow - refunded transaction logs

4.2.2.3. Transfer Registration

You can do a transfer registration from both:

- Transaction History Page
- Registration Report Page

~ Previous 1 2 3 4 5 6 7 8 9 10 11 Next →		
Amount	Status	Actions
\$0.00	Paid by Credit Book	(i)
(-\$1.80)	Credit Book Adjustment	(i)
(-\$180.00)	Refunded	(i)
\$200.00 (i)	Paid / Clear	Refund Transfer Registration
\$150.00 (i)	Paid / Clear	Print Receipt ▲
\$50.00	Paid by Credit Book	(i)
\$150.00 (i)	Paid / Cleared	▼
\$50.00	Paid by Credit Book	(i)
(-\$176.00)	Credit Book Adjustment	(i)

Fig. 4.2.2.3.1. Transfer Registration option from actions dropdown in the Transaction History Page

Person 1

Person 2

Date

The screenshot shows a software application window with a dark header and sidebar. The main area contains a table of transaction history and a modal dialog box.

Transfer Registration Dialog:

- Event:** CB Test 3
- Registrant:** Charlee Dixon
- Golfers:** Dixon, Charlee
- Registration Option:** Fee
- Paid Amount:** \$150.00

Please select the event to transfer to. Based on the target event amount, we will compute and display a list of transactions.

Event: Select one **Registration Option:** Select one

Buttons: Cancel (black), Transfer (orange)

Table Headers: Transaction Count, 4, 4, 35, 40, (8), TOTAL

Table Data:

Event :	Player :	Description :	Date and Time ▲	Amount :	Status :	Action
CB Test 4	Juan Valdez	Credit Book	08/24/2023, 02:03 PM	\$0.00	Paid by Credit Book	
fund	Dixon3, Ken	Credit Book ⓘ	08/24/2023, 01:58 PM	(\$1.80)	Credit Book Adjustment	
CB Test 3	Ken Dixon3	Open Registration Fee for CB Tes... ⓘ	08/24/2023, 01:58 PM	(\$180.00)	Refunded	Refund
CB Test 3	Ken Dixon3	Open Registration Fee for CB Tes... ⓘ	08/24/2023, 01:58 PM	\$200.00 ⓘ	Paid / Clear	Transfer Registration
CB Test 3	Charlee Dixon	Open Registration Fee for CB Tes... ⓘ	08/24/2023, 01:53 PM	\$150.00 ⓘ	Paid / Clear	Print Receipt
CB Test 3	Charlee Dixon	Credit Book	08/24/2023, 01:53 PM	\$50.00	Paid by Credit Book	
CB Test 3	Juan Valdez	Open Registration Fee for CB Tes... ⓘ	08/24/2023, 12:43 PM	\$150.00 ⓘ	Paid / Cleared	
CB Test 3	Juan Valdez	Credit Book	08/24/2023, 12:43 PM	\$50.00	Paid by Credit Book	
fund	Adelsberger, Connor	Credit Book ⓘ	08/24/2023, 12:40 PM	(\$176.00)	Credit Book Adjustment	
CB Test 3	Connor Adelsberger	Open Registration Fee for CB Tes... ⓘ	08/24/2023, 12:34 PM	\$0.00 ⓘ	Paid by other means	

Fig. 4.2.2.3.2. Transfer Registration popup in the Transaction History Page

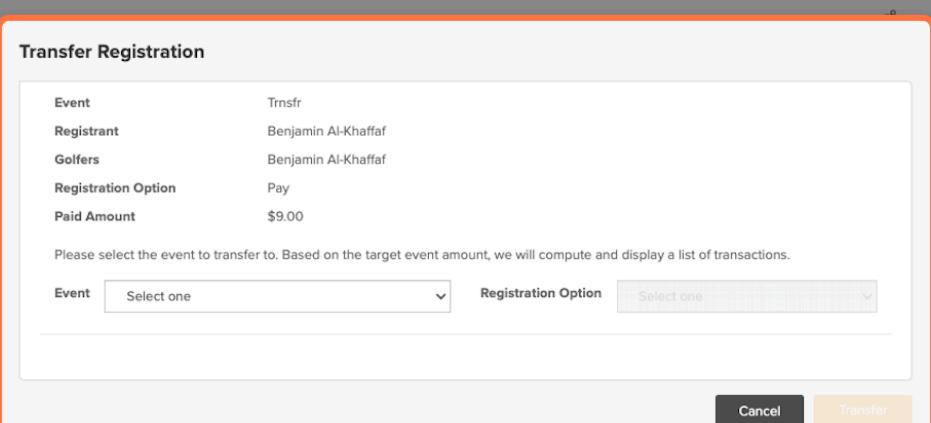
Person 1

Person 2

Date

Players	Canceled	Actions
		
		
	Refund	
		Transfer Registration

Fig. 4.2.2.3.3. Transfer Registration option from actions dropdown in the Registration Report Page



The screenshot shows a modal dialog box titled "Transfer Registration". Inside the dialog, there are several fields and options:

- Event:** Trnsfr
- Registrant:** Benjamin Al-Khaffaf
- Golfers:** Benjamin Al-Khaffaf
- Registration Option:** Pay
- Paid Amount:** \$9.00

Below these fields, a message reads: "Please select the event to transfer to. Based on the target event amount, we will compute and display a list of transactions."

At the bottom of the dialog, there are two buttons: "Cancel" and "Transfer".

The entire "Transfer Registration" dialog box is highlighted with a thick orange border.

Person 1
Person 2

Date

Fig. 4.2.2.3.4. Transfer Registration popup Registration Report Page

4.2.2.3.1. Transfer Registration with no additional payment

1. Golfer that paid \$5 dollars with credit card and \$5 dollars using the credits from credit book

Event :	Player :	Description :	Date and Time ▲	Amount :	Status :	Actions
Refund	Brian Test	Credit Book ⓘ	10/05/2023, 02:07 PM	(\$0.00)	Credit Book Adjustment	ⓘ
CB - donation	Brian Test	Open Registration Fee for CB - d... ⓘ	10/05/2023, 02:02 PM	\$0.00 ⓘ	Paid by other means	▼
CB - donation	Brian Test	Credit Book	10/05/2023, 02:02 PM	\$15.00	Paid by Credit Book	▼
Refund	Brian Test	Credit Book ⓘ	10/04/2023, 04:47 PM	(\$15.00)	Credit Book Adjustment	ⓘ
CB - donation	Brian Test	Open Registration Fee for CB - d... ⓘ	10/04/2023, 04:47 PM	(\$5.00)	Refunded	
CB - donation	Brian Test	Credit Book	10/04/2023, 04:47 PM	(\$15.00)	Paid by Credit Book	ⓘ
CB - bugs4	andrei bogdan	Donation	10/04/2023, 12:47 PM	\$10.00	Paid / Cleared	▼
CB - bugs4	andrei bogdan	Open Registration Fee for CB - b... ⓘ	10/04/2023, 12:47 PM	\$30.00	Paid / Cleared	▼
CB - donation	Brian Test	Open Registration Fee for CB - d... ⓘ	10/03/2023, 12:19 PM	(\$40.00)	Refunded	
Event2	Avery Deal	Open Registration Fee for Event2... ⓘ	10/03/2023, 12:17 PM	\$5.00 ⓘ	Paid / Cleared	▼
Event2	Avery Deal	Credit Book	10/03/2023, 12:17 PM	\$5.00	Paid by Credit Book	ⓘ
CB - donation	Brian Test	Open Registration Fee for CB - d... ⓘ	10/03/2023, 12:16 PM	(\$10.00)	Refunded	
CB - donation	Brian Test	Open Registration Fee for CB - d... ⓘ	10/03/2023, 12:13 PM	(\$20.00)	Refunded	
Event2	Josh Test	Open Registration Fee for Event2... ⓘ	10/03/2023, 12:02 PM	\$10.00	Paid / Cleared	▼
Event1	Victoria Cui ⓘ	Open Registration Fee for Event1... ⓘ	10/03/2023, 11:21 AM	\$0.00 ⓘ	Paid by other means	▼

Fig. 4.2.2.3.5. Transfer Registration with no additional payment - target transaction

2. Click on Transfer Registration

Person 1
Person 2

Date

Refunded	
Paid by Credit Book	(i)
Paid / Cleared	▼
Paid / Cleared	▼
Refunded	Refund
	Transfer Registration
Paid / Cleared	Print Receipt
Paid by Credit Book	(i)
Refunded	
Refunded	

A dropdown menu is open, showing the following options: Refund, Transfer Registration, and Print Receipt. The Transfer Registration option is highlighted with a red rectangular box.

A vertical orange button on the right labeled "HELP" with a question mark icon is also visible.

Fig. 4.2.2.3.6. Transfer Registration with no additional payment - option from actions dropdown

3. Transfer Registration with no payment

Person 1
Person 2

Date

The screenshot shows the 'Transfer Registration' dialog box from a software interface. The dialog displays the following information:

Event	Event2
Registrant	Avery Deal
Golfers	Avery Deal
Registration Option	Pay2
Paid Amount	\$5.00

Please select the event to transfer to. Based on the target event amount, we will compute and display a list of transactions.

Event: CB - bugs2 Registration Option: Pay - \$10.00

Transaction Summary

Target Event Amount	\$10.00
Amount Previously Paid	\$5.00
Amount Paid with Credit Book	\$5.00

The amounts match and the transfer will be performed without additional transactions.

Cancel Transfer

Below the dialog, the main interface shows transaction counts and totals:

Refunded	TOTAL
(126)	343
Total	\$480.00
	\$97.00
	(\$112.00)
	\$199.00
	\$2,309.90
	(\$1,033.80)
	\$1,940.10

Fig. 4.2.2.3.7. Transfer Registration with no additional payment - transaction summary details, including credit card and credit book payment

4. Transfer Registration with Payment

The screenshot shows the 'Transfer Registration' dialog box from a software interface. The dialog displays the following information:

Event	Event2
Registrant	Avery Deal
Golfers	Avery Deal
Registration Option	Pay2
Paid Amount	\$5.00

Please select the event to transfer to. Based on the target event amount, we will compute and display a list of transactions.

Event: CB1 Registration Option: Pay - \$30.00

Transaction Summary

Target Event Amount	\$30.00
Amount Previously Paid	\$5.00
Amount Paid with Credit Book	\$5.00

Difference: \$20.00

Transfer registration without charging the difference
 Transfer and automatically send invoice for \$20.00

Cancel Transfer

Below the dialog, the main interface shows transaction counts and totals:

Refunded	TOTAL
(126)	343
Total	\$480.00
	\$97.00
	(\$112.00)
	\$199.00
	\$2,309.90
	(\$1,033.80)
	\$1,940.10

Fig. 4.2.2.3.8. Transfer Registration with payment - option to transfer and automatically send the invoice

5. Transfer Registration with Refund

Person 1
Person 2

Date

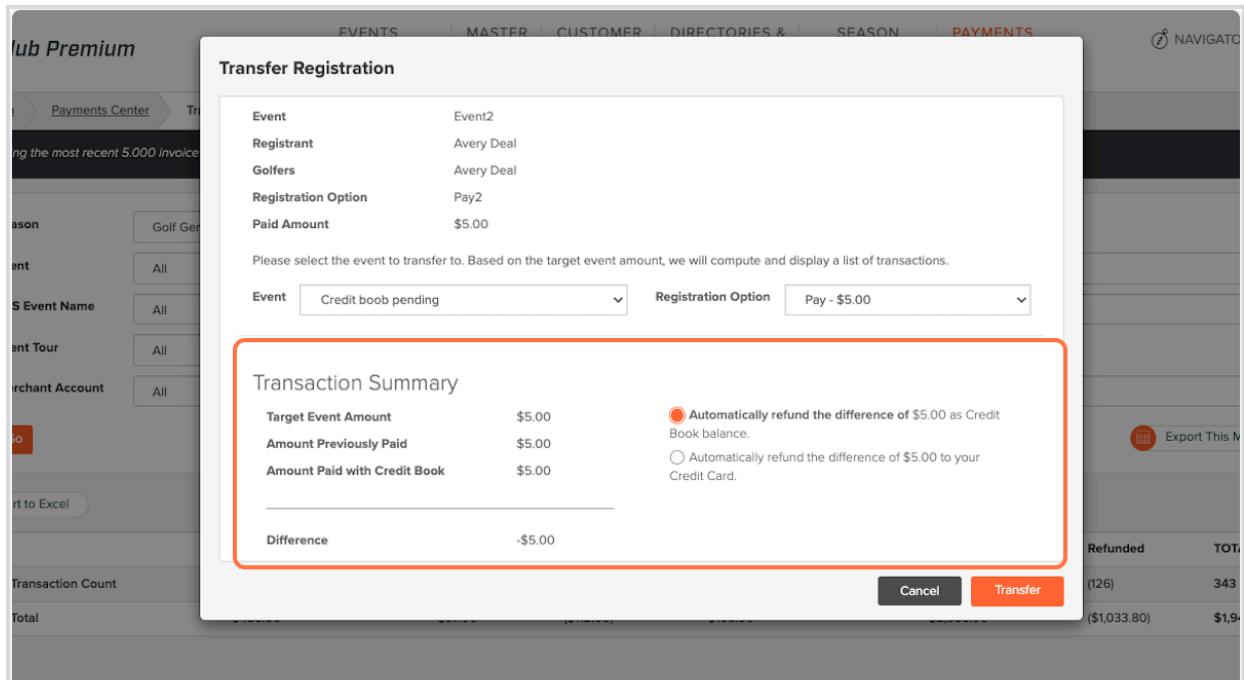


Fig. 4.2.2.3.9. Transfer Registration with refund - option automatically refund the difference to the Credit Book balance

4.2.2.3.2. Transfer Registration with no additional payment

In this case, we execute a registration transfer without requiring any additional payments. This is possible because the initial payment made for the original event registration fee already covers the event registration we intend to transfer to."

4.2.2.3.3. Transfer Registration with Refund

In this case, when transferring players from one event to another, managers have the capability to issue any remaining amount as a refund directly to the player's Credit Book.

4.2.2.3.4. Transfer Registration with Payment

In this case, when transferring players from one event to another, managers have the option to charge any remaining amount from the player's Credits, but only if there are sufficient Credits available.

Person 1
Person 2

Date

4.2.2.4. Generating reports

The screenshot shows a player log table with various filters at the top. A large orange rectangle highlights the 'Export to Excel' button, which has a grid icon and the text 'Export to Excel'.

Merchant Account	All	Start Date	
Go			
Export to Excel			
	Transfer In	Transfer Out	Paid to
Transaction Count	11	11	6
Total	\$400.00	(\$400.00)	\$0.00

Fig. 4.2.2.4.1. Export to Excel player log table

4.2.2.4.1. Export shortcuts based on popular recent timeline

The screenshot shows a timeline-based export interface with various filters at the top. Three buttons at the bottom right are highlighted with an orange rectangle: 'Export Today', 'Export This Week', and 'Export This Month'. Each button has a grid icon and the text 'Export Today', 'Export This Week', and 'Export This Month' respectively.

We are showing the most recent 5,000 invoices. Please adjust the filters if you can not find the invoice you are looking for.							
Event	All	Player	All	Status	All		
AFS Event Name	All	AFS Qualifier Name	All	AFS Revenue Code	All		
Merchant Account	All	Start Date	2022-05-17	End Date			
Go		Export Today	Export This Week	Export This Month			
Export to Excel							
	Transfer In	Transfer Out	Paid by other means	Paid / Cleared	Paid / Pending	Refunded	TOTAL
Transaction Count	11	11	6	14	6	(10)	38
Total	\$400.00	(\$400.00)	\$0.00	\$695.00	\$220.00	(\$425.00)	\$490.00

Fig. 4.2.2.4.2. Export to Excel based on timeline: today, this week, this month

4.2.2.4.2. The excel will have multiple tabs

- Transactions Tab
 - **Event:** The name of the event associated with the payment.

Person 1

Person 2

Date

- **Player:** The golfer making the payment.
- **Description:** A brief payment description.
- **Date and Time:** The date and time of the payment.
- **Amount:** The payment amount.
- **Status:** Payment status (e.g., completed).
- **Credit Entry Id:** An identifier for the credit entry.
- Credit Book
 - **Event:** The event related to the refund.
 - **Player:** The golfer receiving the refund.
 - **Description:** A brief refund description.
 - **Date and Time:** The date and time of the refund.
 - **Amount:** The refunded amount.
 - **Status:** Refund status (e.g., processed).
 - **Credit Entry Id:** An identifier for the credit entry.
- Summary
 - **Paid/cleared:** This column summarizes transactions that have been both paid and cleared, indicating that the payment has been successfully processed.
 - **Paid/pending:** Transactions that have been paid but are still pending further processing or clearance.
 - **Paid by other means:** Records transactions that were paid through methods other than the Credit Book, Credit Card
 - **Refunded:** Summarizes transactions that have been refunded, helping to track the total number of refunds issued.
 - **Refunded to User's Credit Book:** Indicates transactions where refunds have been credited directly to the user's Credit Book.
 - **Credit Book Redeemed:** This column records instances where Credit Book balances have been used for payments or redemptions.
 - **Transfer Out:** Shows transactions related to the transfer of funds or credits out of a user's account.
 - **Transfer In:** Records transactions related to the transfer of funds or credits into a user's account.

Person 1
Person 2

Date

Event	Player	Description	Date and Time	Amount	Status
Credit book event	Adam Sandler	Open Registration Fee for Credit book event event	04/28/2023, 11:16 AM	US\$ 200,00	Paid / Cleared
Credit book event	Craig Watson	Open Registration Fee for Credit book event event	04/28/2023, 11:18 AM	US\$ 150,00	Paid / Cleared
Credit book event	Dana Klein	Open Registration Fee for Credit book event event	04/28/2023, 11:19 AM	US\$ 200,00	Paid / Cleared
Credit book event	Dana Klein	Open Registration Fee for Credit book event event	04/28/2023, 11:19 AM	US\$ (100,00)	Refunded
Credit book event	Craig Watson	Open Registration Fee for Credit book event event	04/28/2023, 11:20 AM	US\$ (150,00)	Refunded
Credit book event	Adam Sandler	Open Registration Fee for Credit book event event	04/28/2023, 12:07 PM	US\$ (200,00)	Refunded
Credit book event	Anee Brooks	Open Registration Fee for Credit book event event	04/28/2023, 12:18 PM	US\$ 150,00	Paid / Cleared
Credit book event	Anee Brooks	Open Registration Fee for Credit book event event	04/28/2023, 01:05 PM	US\$ (80,00)	Refunded
Event Transfer Rego	Anee Brooks	Open Registration Fee for Event Transfer Rego event	04/28/2023, 03:01 PM	US\$ 170,00	Paid / Pending
Event Transfer Rego	Jane Steinger	Open Registration Fee for Event Transfer Rego event	04/28/2023, 04:59 PM	US\$ 0,00	Paid by other means
Split payments	Adam Sandler Abigail Crawford	Open Registration Fee for Split payments event	05/04/2023, 01:22 PM	US\$ 0,00	Paid / Pending
Credit book event	Emil Shatner	Open Registration Fee for Credit book event event	05/10/2023, 04:57 PM	US\$ 0,00	Paid by other means
Credit book event	Dorothy Ruson	Open Registration Fee for Credit book event event	05/10/2023, 05:32 PM	US\$ 125,00	Paid / Cleared
Credit book event	Dorothy Ruson	Open Registration Fee for Credit book event event	05/10/2023, 05:54 PM	US\$ (50,00)	Debit
Event Transfer Rego	Dorothy Ruson	Open Registration Fee for Event Transfer Rego event	05/10/2023, 05:54 PM	US\$ 50,00	Credit
Credit book event	Dorothy Ruson	Open Registration Fee for Credit book event event	05/10/2023, 05:54 PM	US\$ (100,00)	Refunded
CB 1	Hugh Butterfield	Open Registration Fee for CB 1 event	05/11/2023, 11:45 AM	US\$ 95,00	Paid / Cleared
CB 1	Hugh Butterfield	Open Registration Fee for CB 1 event	05/11/2023, 12:04 PM	US\$ (70,00)	Debit
Event Transfer Rego	Hugh Butterfield	Open Registration Fee for Event Transfer Rego event	05/11/2023, 12:04 PM	US\$ 70,00	Credit
CB 1	Grace Phillips	Open Registration Fee for CB 1 event	05/11/2023, 12:32 PM	US\$ 30,00	Paid / Cleared
CB 1	Grace Phillips	Open Registration Fee for CB 1 event	05/11/2023, 12:36 PM	US\$ (30,00)	Debit
Event Transfer Rego	Grace Phillips	Open Registration Fee for Event Transfer Rego event	05/11/2023, 12:36 PM	US\$ 30,00	Credit

Fig. 4.3.2.4.2.1. Transactions Tab in Spreadsheet

Event	Player	Description	Date and Time	Amount	Status	Credit Entry ID
Refund	Dana Klein	Approved by: Crina Stanica with reason: 100 to credit book	4/28/23	(\$100,00)	Paid by other means	1002
Refund	Craig Watson	Approved by: Crina Stanica	4/28/23	(\$150,00)	Paid by other means	1003
Refund	Adam Sandler	Approved by: Crina Stanica	4/28/23	(\$80,00)	Paid by other means	1004
Payment	Dana Klein	N/A	4/28/23	\$50,00	Paid by other means	1005
Refund	Adam Sandler	Approved by: Crina Stanica with reason: Approved by: Crina Stanica	4/28/23	(\$80,00)	Paid by other means	1006
Refund	Anee Brooks	Approved by: Crina Stanica with reason: 80\$ refunded to CB	4/28/23	(\$80,00)	Paid by other means	1007
Event Transfer Rego	Anee Brooks	Credit Book	4/28/23	\$80,00	Paid by other means	1008
Event Transfer Rego	Jane Steinger	Credit Book	4/28/23	\$50,00	Paid by other means	1009
Splits payments	Adam Sandler	Credit Book	5/4/23	\$25,00	Paid by other means	1014
Refund	Adam Sandler	Approved by: Crina Stanica	5/4/23	(\$25,00)	Paid by other means	1018
Credit book event	Emil Shatner	Credit Book	5/10/23	\$200,00	Paid by other means	1027
Credit book event	Dorothy Ruson	Credit Book	5/10/23	(\$25,00)	Paid by other means	1028
Refund	Dorothy Ruson	Approved by: Crina Stanica with reason: Transfer to Event Transfer Rego	5/10/23	(\$125,00)	Paid by other means	1029
Event Transfer Rego	Hugh Butterfield	Credit Book	5/11/23	\$25,00	Paid by other means	1035
Refund	Hugh Butterfield	Approved by: Crina Stanica with reason: Transfer to Event Transfer Rego	5/11/23	(\$75,00)	Paid by other means	1036
Event Transfer Rego	Grace Phillips	Credit Book	5/11/23	\$130,00	Paid by other means	1038
Refund	Grace Phillips	Approved by: Crina Stanica with reason: Transfer to Event Transfer Rego	5/11/23	(\$160,00)	Paid by other means	1039
Event Transfer Rego	Jack Barbara	Credit Book	5/11/23	\$75,00	Paid by other means	1040
Refund	Jack Barbara	Approved by: Crina Stanica with reason: Transfer to Event Transfer Rego	5/11/23	(\$100,00)	Paid by other means	1041
Event Transfer Rego	Georgia Courville	Credit Book	5/11/23	\$100,00	Paid by other means	1042
CB NonMember \$100	a 1	Credit Book	5/11/23	(\$75,00)	Paid by other means	1044

Fig. 4.3.2.4.2.2. Credit Book Tab in Spreadsheet

Person 1
Person 2

Date

The screenshot shows a software interface with a top navigation bar containing 'Transactions', 'Credit Book', and a green 'Summary' tab. Below the navigation bar is a large table titled 'Status' with columns for 'Transaction Count' and 'Total'. The table includes rows for various transaction types and a total row.

Status	Transaction Count	Total		
Paid/Cleared	18	\$1,395.00		
Paid/Pending	7	\$390.00		
Paid by other means	7	\$0.00		
Refunded	14	(\$955.00)		
Refunded to User's Credit Book	14	\$1,175.00		
Credit Book Redeemed	25	\$1,830.00		
Transfer Out	11	-\$400.00		
Transfer In	11	\$400.00		
TOTAL:	93	\$2,660.00		

Fig. 4.3.2.4.2.3. Summary Tab in Spreadsheet

4.2.2.5. Filtering

Above the list of transactions table, we added a section dedicated to filtering player log payments, as well as export options.

4.2.2.5.1. Filter by Event

The screenshot shows a filtering interface for transaction history. It includes dropdown menus for 'Event' (set to 'All'), 'AFS Event Name' (with a search bar and dropdown menu showing 'All', 'CB 1', 'CB NonMember \$100', 'CB NonMember \$50', 'Credit book event', 'Event Transfer Rego', 'May Event', and 'Membership Program Fees'), 'Merchant Account' (set to 'All'), and a 'Go' button. To the right are filters for 'Player' (set to 'All'), 'Status' (set to 'All'), 'AFS Qualifier Name' (set to 'All'), 'AFS Revenue Code' (set to 'All'), 'Start Date' (set to '2022-05-17'), and 'End Date'. At the bottom are three export buttons: 'Export Today', 'Export This Week', and 'Export This Month'. Below the filters is a table with transaction counts and totals.

	Transfer Out	Paid by other means	Paid / Cleared	Paid / Pending	Refunded	TOTAL
Transaction Count	11	11	6	14	6	(10) 38
Total	\$400.00	(\$400.00)	\$0.00	\$695.00	\$220.00	(\$425.00) \$490.00

Fig. 4.2.2.5.1. Transaction History - Filters - event filter

4.2.2.5.2. Filter by Player Name

Person 1
Person 2

Date

We are showing the most recent 5,000 invoices. Please adjust the filters if you can not find the invoice you are looking for.

Event	All	Player	All	Status	All	
AFS Event Name	All	AFS Qualifier Name	<input type="text" value=""/>	AFS Revenue Code	All	
Merchant Account	All	Start Date	All	End Date		
<input type="button" value="Go"/>		Abigail Crawford Adam Sandler Anee Brooks Craig Watson Dana Klein Dorothy Ruson Emil Shatner				
<input type="button" value="Export to Excel"/>		<input type="button" value="Export This Week"/> <input type="button" value="Export This Month"/>				
Transfer In	Transfer Out	Paid by other means	Paid / Cleared	Paid / Pending	Refunded	TOTAL
11	11	6	14	6	(10)	38

Fig. 4.2.2.5.2. Transaction History - Filters - player name filter

4.2.2.5.3. Filter by Status

We are showing the most recent 5,000 invoices. Please adjust the filters if you can not find the invoice you are looking for.

Event	All	Player	All	Status	All	
AFS Event Name	All	AFS Qualifier Name	All	AFS Revenue Code	All	
Merchant Account	All	Start Date	2022-05-17	End Date	All	
<input type="button" value="Go"/>		<input type="button" value="Export Today"/> <input type="button" value="Export This Week"/>				
<input type="button" value="Export to Excel"/>		Not Paid Paid / Pending Paid by other means Refunded Transfer				
Transfer In	Transfer Out	Paid by other means	Paid / Cleared	Paid / Pending	Refunded	TOTAL
11	11	6	14	6	(10)	38

Fig. 4.2.2.5.3. Transaction History - Filters - status filter

4.2.2.5.4. Filter by AFS specific filters

Person 1
Person 2

Date

We are showing the most recent 5,000 invoices. Please adjust the filters if you can not find the invoice you are looking for.

Event	All	Player	All	Status	All
AFS Event Name	All	AFS Qualifier Name	All	AFS Revenue Code	All
Merchant Account	All	Start Date	2022-05-17	End Date	

Go **Export Today** **Export This Week** **Export This Month**

Export to Excel

	Transfer In	Transfer Out	Paid by other means	Paid / Cleared	Paid / Pending	Refunded	TOTAL
Transaction Count	11	11	6	14	6	(10)	38
Total	\$400.00	(\$400.00)	\$0.00	\$695.00	\$220.00	(\$425.00)	\$490.00

HELP

Fig. 4.2.2.5.4. Transaction History - Filters - AFS specific filters

4.2.2.5.5. Filter by Date

We are showing the most recent 5,000 invoices. Please adjust the filters if you can not find the invoice you are looking for.

Event	All	Player	All	Status	All
AFS Event Name	All	AFS Qualifier Name	All	AFS Revenue Code	All
Merchant Account	All	Start Date	2022-05-17	End Date	

Go **Export Today** **Export This Week** **Export This Month**

Export to Excel

	Transfer In	Transfer Out	Paid by other means	Paid / Cleared	Paid / Pending	Refunded	TOTAL
Transaction Count	11	11	6	14	6	(10)	38
Total	\$400.00	(\$400.00)	\$0.00	\$695.00	\$220.00	(\$425.00)	\$490.00

→ Previous 1 2 3 4 5 6 Next →

Fig. 4.2.2.5.5. Transaction History - Filters - date filters

4.2.2.5.6. Export shortcuts based on popular recent timeline

Person 1
Person 2

Date

We are showing the most recent 5,000 invoices. Please adjust the filters if you can not find the invoice you are looking for.

Event	All	Player	All	Status	All		
AFS Event Name	All	AFS Qualifier Name	All	AFS Revenue Code	All		
Merchant Account	All	Start Date	2022-05-17	End Date			
Go Export Today Export This Week Export This Month							
Export to Excel HELP							
	Transfer In	Transfer Out	Paid by other means	Paid / Cleared	Paid / Pending	Refunded	TOTAL
Transaction Count	11	11	6	14	6	(10)	38
Total	\$400.00	(\$400.00)	\$0.00	\$695.00	\$220.00	(\$425.00)	\$490.00

Fig. 4.2.2.5.6. Transaction History - Filters - export to excel based on timeline: today, this week, this month

4.2.3 Master Roster

1. On the Master Roster page, you can select any golfer and open the details popup

Golf Genius
TM CLUB PREMIUM

EVENTS, LEAGUES & TRIPS MASTER ROSTER CUSTOMER SETTINGS DIRECTORIES & REGISTRATION SEASON MANAGEMENT PAYMENTS CENTER My account System Status: Normal

Pirvu Cristian Master Roster

You have recently updated the handicap indexes in the Master Roster. If you would like to propagate these indexes to leagues, events or trips, please click here

Actions	Handle	H.I. :	Email :	Country :
▼	Ace Harris		jason.georgiaag@gmail.com	-
▼	Ace Nahiku Hickman		ceomarcus@yahoo.com	-
▼	ad a	3.3	ad1@foozee.net	-
▼	Ada Inderlied		steph.inderlied@gmail.com	-
▼	Adalee Gerber			-
▼	Adalyn Pike	6.4	apikesong4life@gmail.com	-
▼	Adam Adam		adam@test.com	-
▼	Adam Anderson		neal.j.anderson@gmail.com	-
▼	Adam Sailor	2.6	adams@gmail.com	United States of America
▼	Adam Szczepanik			-

Fig. 4.2.3.1. Master Roster - selecting a golfer from the roster

2. We added a new Credit Book Tab

Person 1
Person 2

Date

Edit Adam Sailor

Profile Registration H.I. Summary Custom Fields Default Tees Participation History Activity Logs Transactions Credit Book

Balance: \$1.00 Adjust Balance ▾ Advanced filtering ▾

CREDIT BOOK LOGS

ID	Date / Time ▾	Event	Details	Type	Amount	Total Credits Balance ⓘ
1006	05/02/2023, 10:34 AM	Credit book	Open Registration Fee for Credit... ⓘ	Refund	(\$5.00) ⓘ	\$5.00
1007	05/02/2023, 11:01 AM	Credit book	Open Registration Fee for Credit... ⓘ	Payment	(\$5.00) ⓘ	\$0.00
1019	05/03/2023, 10:25 AM	Credit book transfer 2	Open Registration Fee for Credit... ⓘ	Payment	(\$0.00) ⓘ	\$0.00
1020	05/03/2023, 12:00 AM	Manual Adjustment	N/A ⓘ	Manual Adjustment	(\$20.00)	\$20.00
1037	05/04/2023, 12:04 PM	Manual Adjustment	Manual ⓘ	Manual Adjustment	(\$1.00)	\$21.00

Cancel Save

Fig. 4.2.3.2. Master Roster - Edit golfer popup - added a new credit book tab

3. Credit Book Log Section

Person 1
Person 2

Date

The screenshot shows a 'Edit Adam Sailor' dialog box. On the left is a sidebar with links: Profile, Registration, H.I. Summary, Custom Fields, Default Tees, Participation History, Activity Logs, Transactions, and Credit Book (which is selected and highlighted in orange). The main area displays a table titled 'CREDIT BOOK LOGS' with the following data:

ID	Date / Time	Event	Details	Type	Amount	Total Credits Balance
1006	05/02/2023, 10:34 AM	Credit book	Open Registration Fee for Credit...	Refund	(\$5.00)	\$5.00
1007	05/02/2023, 11:01 AM	Credit book	Open Registration Fee for Credit...	Payment	(\$5.00)	\$0.00
1019	05/03/2023, 10:25 AM	Credit book transfer 2	Open Registration Fee for Credit...	Payment	(\$0.00)	\$0.00
1020	05/03/2023, 12:00 AM	Manual Adjustment	N/A	Manual Adjustment	(\$20.00)	\$20.00
1037	05/04/2023, 12:04 PM	Manual Adjustment	Manual	Manual Adjustment	(\$1.00)	\$21.00

A red box highlights the 'CREDIT BOOK LOGS' section. At the bottom right of the dialog are 'Cancel' and 'Save' buttons.

Fig. 4.2.3.3. Master Roster - Edit golfer popup - showcase credit book logs with the same details as in the Credit Book page

4. Credit Book Balance

Person 1
Person 2

Date

The screenshot shows a sidebar with icons for Profile, Registration, H.I. Summary, Custom Fields, Default Tees, and Participation History. The main area displays a balance of \$1.00, followed by a table of credit book logs.

ID	Date / Time	Event	Details	Type	Amount	Total Credits	Balance
1006	05/02/2023, 10:34 AM	Credit book	Open Registration Fee for Credit...	Refund	(\$5.00)	\$5.00	\$5.00
1007	05/02/2023, 11:01 AM	Credit book	Open Registration Fee for Credit...	Payment	(\$5.00)	\$0.00	\$0.00

Fig. 4.2.3.4. Master Roster - Edit golfer popup - showcase golfer's credit book balance

5. Click on Adjust Balance

The screenshot shows the same interface as Fig. 4.2.3.4, but the 'Adjust Balance' button in the top right corner is highlighted with a red box.

ID	Date / Time	Event	Details	Type	Amount	Total Credits	Balance
1006	05/02/2023, 10:34 AM	Credit book	Open Registration Fee for Credit...	Refund	(\$5.00)	\$5.00	\$5.00
1007	05/02/2023, 11:01 AM	Credit book	Open Registration Fee for Credit...	Payment	(\$5.00)	\$0.00	\$0.00

Fig. 4.2.3.5. Master Roster - Edit golfer popup - adjust balance action

6. It will open up Credit Book page with the Credit Book Manual Adjustment popup open

Person 1
Person 2

Date

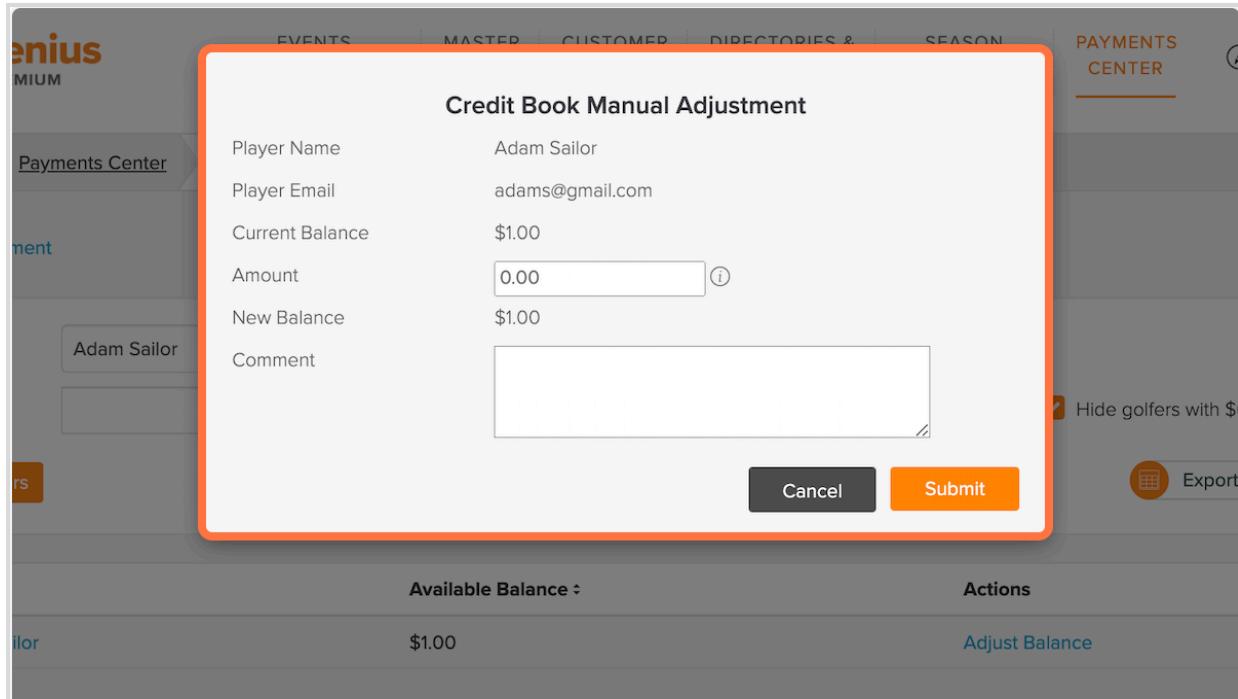


Fig. 4.2.3.6. Master Roster - Edit golfer popup - manually adjusting credit book balance

7. Click on Advanced filtering

The screenshot shows the 'Edit Adam Sailor' dialog box. On the right, under 'CREDIT BOOK LOGS', there is a table of logs. At the top right of this section, there are links for 'Adjust Balance' and 'Advanced filtering'. The 'Advanced filtering' link is highlighted with a red box.

Fig. 4.2.3.7. Master Roster - Edit golfer popup - advanced filtering action

8. It will open up Credit Book page with the player filtered

Person 1
Person 2

Date

The screenshot shows the 'Payments Center' section of the Golf Genius software. At the top, there are navigation links: EVENTS, LEAGUES & TRIPS, MASTER ROSTER, CUSTOMER SETTINGS, DIRECTORIES & REGISTRATION, SEASON MANAGEMENT, PAYMENTS CENTER (which is highlighted in orange), and My account. A status message 'System Status: Normal' is also present.

The main area is titled 'Credit Book'. It includes a breadcrumb trail: Pirvu Cristian > Payments Center > Credit Book. Below this, there's a 'Manual Adjustment' section with filters for Player (set to 'Adam Sailor'), Type (set to 'All'), Start Date, End Date, and a checked checkbox for 'Hide golfers with \$0 balance'. There are 'Apply filters' and 'Export to Excel' buttons.

The data table has columns: Name :, Available Balance :, and Actions. One row is shown for 'Adam Sailor' with an available balance of '\$1.00'. An 'Adjust Balance' button is located next to this row. A vertical 'HELP' button is on the right side of the table.

Name :	Available Balance :	Actions
Adam Sailor	\$1.00	Adjust Balance

Fig. 4.2.3.8. Master Roster - Credit book - showcase the player filtered

4.3. User flows

4.3.1. Available Balance

Users will be able to check their available balance within the Player Dashboard.

Person 1
Person 2

Date

The screenshot shows a player's dashboard with a navigation bar at the top: Home, Tee Sheets, Results, Analytics, Social, and a gear icon. Below the navigation bar are four tabs: Player Profile, Participation History, Registration & Membership, and Transactions (which is highlighted with a red border). The main content area has three sections: CREDIT BOOK, PAYMENT METHODS, and TRANSACTIONS. The CREDIT BOOK section displays an available balance of \$320 (Credits). The TRANSACTIONS section lists two events: a Credit book event from 04/28/2023 at 05:07 AM which was Refunded, and another from 04/28/2023 at 04:16 AM which is Paid. An Export to Excel button is located in the top right of the TRANSACTIONS section. A vertical HELP button is on the far right.

Fig 4.3.1.1. On the players dashboard widget, on Transactions tab we added the Credit Book section

This screenshot shows the same player's dashboard as Fig 4.3.1.1, but the Available balance in the CREDIT BOOK section is highlighted with a red border. The rest of the interface is identical to the previous figure.

Fig 4.3.1.2. Credit Book Available Balance

There are no saved payment methods. Credit cards can be added during the checkout process.						
TRANSACTIONS						
EVENT	All					Export to Excel
Event	Description	Date and time	Amount	Status	Actions	
Credit book event	Open Registration Fee for Credit book...	04/28/2023, 05:07 AM	(\$200.00)	Refunded	Print Receipt	
Credit book event	Open Registration Fee for Credit book...	04/28/2023, 04:16 AM	\$200.00	Paid / Cleared	Print Receipt	

Fig 4.3.1.3. Transactions area with description, date, amount status and ability to print receipt

4.3.2. User payment flows

Credit Book balance can be used while completing transactions within Tournament Management for obtaining a discount (up to 100%) during payment.

The resulting three cases have to be covered:

- Do not use Credit Book
 - Payment continues as usual, without any changes to the previous existing flow;
- Use Credit Book for Discount (mixed, available balance less than transaction amount)
 - If the user does not have enough credits to cover the entire purchase, 100% of his credits will be used when providing a discount, while the remaining fee after the discount must be paid as before;
 - Payment Form is displayed;
- Use Credit Book for entire purchase (100%)
 - If the user has an available balance greater than the transaction amount, he can choose to pay in full with credits.
 - Payment form is not displayed;

Depending on the user's available credit book balance, he can choose to not use the credit book or choose the other two options available.

4.3.2.1. Not using Credit Book

1. Register for a new event

Person 1
Person 2

Date

The screenshot shows a top navigation bar with links for Home, Tee Sheets, Results, Analytics, Social, and a gear icon. Below this is a section titled "Register now for Credit book event". It contains four buttons: "New Registration" (highlighted with a red border), "Edit Registration", "List of Participants", and "Directory of Leagues & Events". Each button has a corresponding description to its right.

Option	Description
New Registration	Click here to register.
Edit Registration	Click here to edit your registration.
List of Participants	Click here to view a list of already registered golfers.
Directory of Leagues & Events	Click here for list of other events with open registration.

Fig. 4.3.2.1. User payment flows - Not using credit book - new registration option

2. Select one event with the \$150 registration fee

The screenshot shows a registration flow with steps 1. Registration Type, 2. Golfer Information, and 3. Payment. A progress bar indicates the current step is 1. Registration Type. Buttons for "Your Registrations" and "Exit" are at the top right. A message box says "You are currently already part of a registration in this event. Click [here](#) if you wish to edit your registration instead of filling in a new one." Below is a table of registration options:

	Price	Golfers	Available
<input type="radio"/> demo 1	\$90.00 for the entire registration	1 Member	Unlimited
<input checked="" type="radio"/> demo 2	\$150.00 for the entire registration	1 Member	Unlimited
<input type="radio"/> split reg	\$100.00 for the entire registration	1 to 4 Members	Unlimited

An orange "Next" button is at the bottom right.

Fig. 4.3.2.2. User payment flows - Not using credit book - select a demo event

3. Click on Next

This screenshot shows the continuation of the registration process. The steps 1. Registration Type, 2. Golfer Information, and 3. Payment are visible. The "Next" button from the previous screen is now highlighted in orange. The registration table remains the same, showing the three demo options. The "Next" button is located at the bottom right of the page.

Fig. 4.3.2.3. User payment flows - Not using credit book - going through the payment process

Person 1
Person 2

Date

4. With this, we will click Do not use Credit Book

The screenshot shows a user interface for a payment transaction. At the top, it says "demo 2". Below that, it displays "Registration Fee" and "Current Credit Balance: \$370.00". There are two radio button options: "Use Credit Book" (which would leave a balance of \$220.00) and "Do not use Credit Book" (which is selected and highlighted with an orange border). A summary table below shows "demo 2 (\$150.00, 1 Member)" with an amount of "\$150.00". On the right side, there is a vertical "HELP" button.

Fig. 4.3.2.4. User payment flows - Not using credit book - selecting do not use credit book option

5. Not using any Credit from our balance, we will pay the entire \$150 using our credit card

This screenshot shows the same user interface as Fig. 4.3.2.4, but with a different focus. The "Do not use Credit Book" option is selected. In the summary table, the "Total Amount" field is highlighted with an orange border. Below the table, there are fields for "Billing Email" (adaml@test.com), "Name as it appears on credit card (Required)" (Adam Sandler), "Country (Required)" (United States), and "City (Required)" (Los Angeles).

Fig. 4.3.2.5. User payment flows - Not using credit book - pay the entire amount using the credit card

Person 1
Person 2

Date

6. Click on Pay and we are registered for the event.

Because this transaction has actual money in this transaction, the button will have the text **Pay**.

1. Registration Type > 2. Golfer Information > 3. Payment

Your Registrations Exit

demo 2

Registration Fee

Summary for: Randall Stafford

Description	Amount
demo 2 (\$150.00, 1 Member)	\$150.00
Total Amount	\$150.00

Billing Email

Name as it appears on credit card (Required)

Randall Stafford

Country (Required) !

Canada

Credit or debit card

VISA 1111 10 / 24 111

Cancel Skip Payment Pay

HELP ?

Fig. 4.3.2.6. User payment flows - Not using credit book - finishing the registration by pressing the pay button

7. After registering, golfer is going to be redirected to the Summary Page

demo 2

Registration Fee

Receipt

Description	Total Amount	Status	Paid on	By
Open Registration Fee for Credit book event event	\$150.00	Confirmed	05.16.2023	Randall Stafford

Done

Fig. 4.3.2.7. User payment flows - Not using credit book - after the registration flow we showcase the transaction details

Person 1
Person 2

Date

4.3.2.2. Use Credit Book for entire purchase

1. We will first go to the player Dashboard



Fig. 4.3.2.8. User payment flows - Use credit book for the entire purchase - showcasing the player dashboard page from the portal

2. See the Transactions Tab

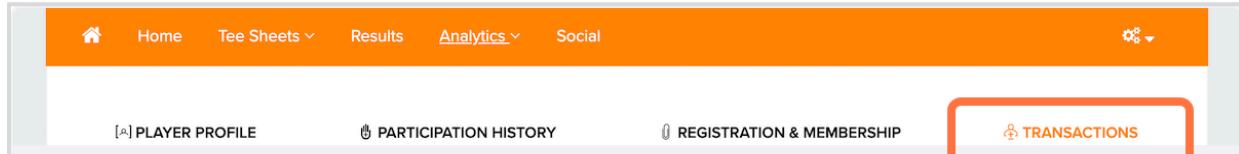


Fig. 4.3.2.9. User payment flows - Use credit book for the entire purchase - showcasing transactions tab

3. The Credit Book Available balance is \$370

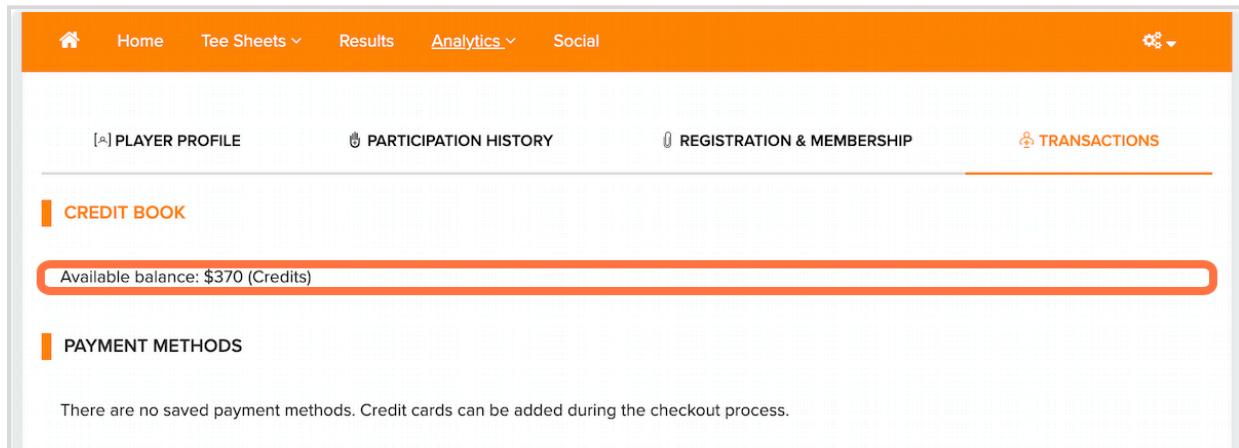


Fig. 4.3.2.10. User payment flows - Use credit book for the entire purchase - Player dashboard - showcasing credit book balance

4. Register for a new event

Person 1
Person 2

Date

The screenshot shows a top navigation bar with links for Home, Tee Sheets, Results, Analytics, Social, and a gear icon. Below this is a section titled "Register now for Credit book event". It contains four buttons: "New Registration" (highlighted with a red border), "Edit Registration", "List of Participants", and "Directory of Leagues & Events". To the right of each button is a brief description: "Click here to register.", "Click here to edit your registration.", "Click here to view a list of already registered golfers.", and "Click here for list of other events with open registration."

Fig. 4.3.2.11. User payment flows - Use credit book for the entire purchase - new registration option

5. Select one event with the \$150 registration fee

This screenshot shows a registration selection interface. At the top, a progress bar indicates steps 1. Registration Type, 2. Golfer Information, and 3. Payment. To the right are buttons for "Your Registrations" and "Exit". A message box states: "You are currently already part of a registration in this event. Click [here](#) if you wish to edit your registration instead of filling in a new one." Below this is a table listing three events:

	Price	Golfers	Available
<input type="radio"/> demo 1	\$90.00 for the entire registration	1 Member	Unlimited
<input checked="" type="radio"/> demo 2	\$150.00 for the entire registration	1 Member	Unlimited
<input type="radio"/> split reg	\$100.00 for the entire registration	1 to 4 Members	Unlimited

A large orange "Next" button is located at the bottom right.

Fig. 4.3.2.12. User payment flows - Use credit book for the entire purchase - select a demo event

6. Click on Next

Person 1

Person 2

Date

You are currently already part of a registration in this event. Click [here](#) if you wish to edit your registration instead of filling in a new one.

	Price	Golfers	Available
<input type="radio"/> demo 1	\$90.00 for the entire registration	1 Member	Unlimited
<input checked="" type="radio"/> demo 2	\$150.00 for the entire registration	1 Member	Unlimited
<input type="radio"/> split reg	\$100.00 for the entire registration	1 to 4 Members	Unlimited

Next

Fig. 4.3.2.13. User payment flows - Use credit book for the entire purchase - going through the payment process

7. The golfer can see his current Credit Book Balance

Registration Fee

Current Credit Balance: \$370.00

Use Credit Book
(Remaining balance after applying credit: \$220.00)

Do not use Credit Book

Summary for: Adam Sandler1

Description	Amount
demo 2 (\$150.00, 1 Member)	\$150.00
Credit Applied (\$150.00)	-\$150.00
Total Amount	\$0.00

Cancel **Register**

HELP

Fig. 4.3.2.14. User payment flows - Use credit book for the entire purchase - showcasing the current Credit Balance of the logged golfer

8. We will use our Credit Book to cover the entire fee

Person 1

Person 2

Date

Registration Fee

Current Credit Balance: \$370.00

Use Credit Book
(Remaining balance after applying credit: \$220.00)

Do not use Credit Book

Summary for: Adam Sandler1

Description	Amount
demo 2 (\$150.00, 1 Member)	\$150.00
Credit Applied (\$150.00)	-\$150.00
Total Amount	\$0.00

Cancel Register

Fig. 4.3.2.15. User payment flows - Use credit book for the entire purchase - option use credit book

9. We can see our remaining balance after applying the credit to the current event fee

Registration Fee

Current Credit Balance: \$370.00

Use Credit Book
(Remaining balance after applying credit: \$220.00) arrow

Do not use Credit Book

Summary for: Adam Sandler1

Description	Amount
demo 2 (\$150.00, 1 Member)	\$150.00
Credit Applied (\$150.00)	-\$150.00
Total Amount	\$0.00

Cancel Register

Fig. 4.3.2.16. User payment flows - Use credit book for the entire purchase - showcasing the remaining balance after applying the credit to the current to the current event fee

Person 1
Person 2

Date

10. We see that the Credit Applied is \$150.00, resulting in the Total Amount being 0.

The screenshot shows a user interface for a registration fee. At the top, it says "Registration Fee" and "Current Credit Balance: \$370.00". There are two radio button options: one selected ("Use Credit Book") which shows a remaining balance of "\$220.00", and another ("Do not use Credit Book"). Below this is a "Summary for: Adam Sandler1" table:

Description	Amount
demo 2 (\$150.00, 1 Member)	\$150.00
Credit Applied (\$150.00)	-\$150.00
Total Amount	\$0.00

At the bottom right are "Cancel" and "Register" buttons. A vertical "HELP" button is on the far right.

Fig. 4.3.2.17. User payment flows - Use credit book for the entire purchase - showcasing the credits applied resulting the total amount to be 0

11. Click on Register and we are registered for the event.

Because we will not have any actual money in this transaction, the button will have the text **Register**.

Person 1
Person 2

Date

Registration Fee

Current Credit Balance: \$370.00

Use Credit Book
(Remaining balance after applying credit: \$220.00)

Do not use Credit Book

Summary for: Adam Sandler1

Description	Amount
demo 2 (\$150.00, 1 Member)	\$150.00
Credit Applied (\$150.00)	-\$150.00
Total Amount	\$0.00

Cancel Register

Fig. 4.3.2.18. User payment flows - Use credit book for the entire purchase - finishing the registration by pressing the register button

12. After registering, golfer is going to be redirected to the Summary Page

demo 2

Registration Fee

Receipt				
Description	Total Amount	Status	Paid on	By
Open Registration Fee for Credit book event event	\$0.00	Confirmed	05.16.2023	Adam Sandler

Done

Fig. 4.3.2.19. User payment flows - Use credit book for the entire purchase - after the registration flow we showcase the transaction details

13. If the golfer goes to the Player Dashboard

Person 1
Person 2

Date

The screenshot shows a player dashboard interface. At the top, there is a navigation bar with links for Home, Tee Sheets, Results, Analytics (which is currently selected), and Social. Below the navigation bar, a section titled "Credit book event" displays "Player Analytics" and "Player Dashboard". A table titled "Your Registrations" is shown, containing one row for "demo 1 Canceled Registration". The table has columns for Created At, Golfers, Status, Amount, and Actions.

	Created At	Golfers	Status	Amount	Actions
demo 1 Canceled Registration	Fri, Apr 28 2023	1 of 1	Confirmed	\$200.00	<button>Actions ▾</button>

Fig. 4.3.2.20. User payment flows - Use credit book for the entire purchase - showcasing the Player Dashboard

14. And clicks on the Transactions tab

The screenshot shows the same player dashboard interface as above, but with the "Transactions" tab highlighted in orange. The tabs available are PLAYER PROFILE, PARTICIPATION HISTORY, REGISTRATION & MEMBERSHIP, and TRANSACTIONS.

Fig. 4.3.2.21. User payment flows - Use credit book for the entire purchase - showcasing the Transactions tab from the Player Dashboard

15. The golfer can see the new Available balance of \$220

The screenshot shows the player dashboard with the "Analytics" tab selected. The "CREDIT BOOK" section is highlighted in orange, showing the message "Available balance: \$220 (Credits)". Other sections like "PARTICIPATION HISTORY", "REGISTRATION & MEMBERSHIP", and "PAYMENT METHODS" are also visible.

Fig. 4.3.2.22. User payment flows - Use credit book for the entire purchase - showcasing the final Credit Book balance after registering for the event

4.3.2.3. Use Credit Book for Partial Payment

1. We will first go to the player Dashboard

Person 1
Person 2

Date



Fig. 4.3.2.23. User payment flows - Use credit book for partial payment - showcasing the Player Dashboard

2. See the Transactions Tab

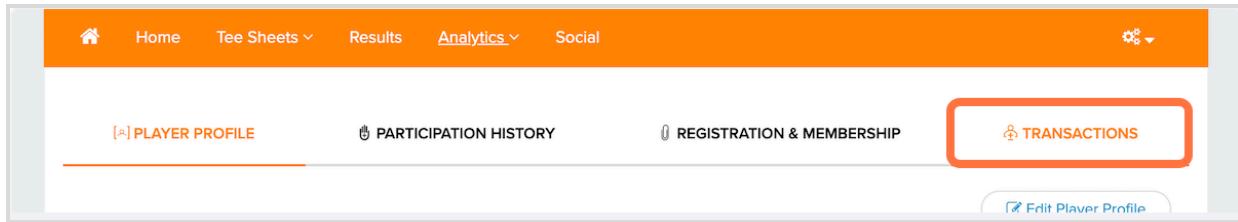


Fig. 4.3.2.25. User payment flows - Use credit book for partial payment - showcasing the Transactions tab from the Player Dashboard

3. The Credit Book Available balance is \$120

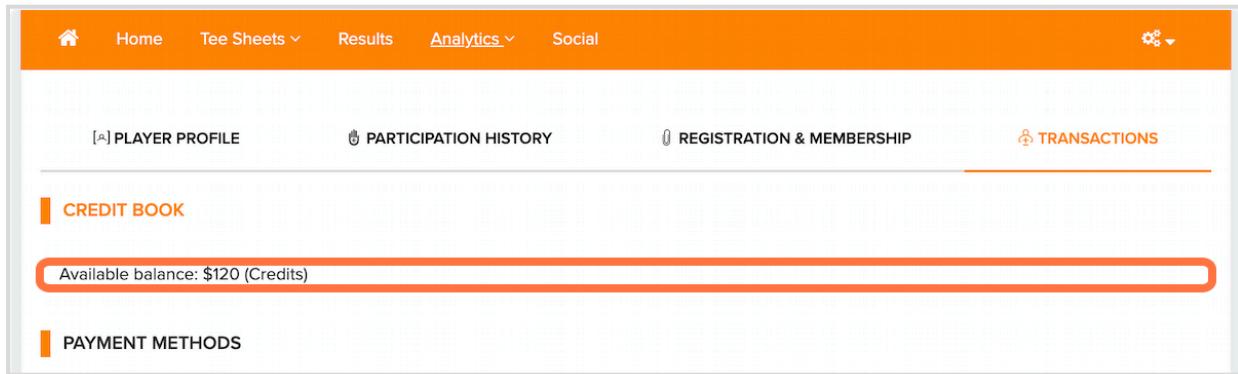


Fig. 4.3.2.26. User payment flows - Use credit book for partial payment - showcasing the initial credit book available balance

4. Register for a new event

Person 1

Person 2

Date

The screenshot shows a top navigation bar with links for Home, Tee Sheets, Results, Analytics, Social, and a settings gear icon. Below the navigation is a section titled "Register now for Credit book event". It contains four buttons: "New Registration" (highlighted with a red border), "Edit Registration", "List of Participants", and "Directory of Leagues & Events". Each button has a corresponding descriptive text to its right.

New Registration	Click here to register.
Edit Registration	Click here to edit your registration.
List of Participants	Click here to view a list of already registered golfers.
Directory of Leagues & Events	Click here for list of other events with open registration.

Fig. 4.3.2.27. User payment flows - Use credit book for partial payment - new registration option

5. Select one event with the \$150 registration fee

The screenshot shows a registration type selection screen. At the top, there are three tabs: "1. Registration Type", "2. Golfer Information", and "3. Payment". On the right, there is an "Exit" button. Below the tabs is a table with four rows. The second row, which corresponds to "demo 2", is highlighted with a red border. The table columns are "Price", "Golfers", and "Available". The "Next" button is located at the bottom right.

	Price	Golfers	Available
<input type="radio"/> demo 1	\$90.00 for the entire registration	1 Member	Unlimited
<input checked="" type="radio"/> demo 2	\$150.00 for the entire registration	1 Member	Unlimited
<input type="radio"/> split reg	\$100.00 for the entire registration	1 to 4 Members	Unlimited

Fig. 4.3.2.28. User payment flows - Use credit book for partial payment - select a demo event

6. Click on Next

This screenshot is identical to Fig. 4.3.2.28, showing the "Registration Type" screen. The "demo 2" option is selected and highlighted with a red border. The "Next" button is highlighted with a red border at the bottom right.

Fig. 4.3.2.29. User payment flows - Use credit book for partial payment - going through the payment process

Person 1
Person 2

Date

7. The golfer can see his current Credit Book Balance

The screenshot shows a software interface for payment processing. At the top, there are three tabs: "1. Registration Type", "2. Golfer Information", and "3. Payment". The "3. Payment" tab is highlighted with an orange arrow. In the top right corner, there is a button labeled "Exit". Below the tabs, the text "demo 2" is displayed. The main area is titled "Registration Fee". A red box highlights the text "Current Credit Balance: \$120.00". Below this, there are two radio button options: one selected ("Use Credit Book") which says "(Remaining balance after applying credit: \$0.00)" and another unselected option ("Do not use Credit Book"). Further down, a section titled "Summary for: Ron Westwood" displays a table of charges:

Description	Amount
demo 2 (\$150.00, 1 Member)	\$150.00
Credit Applied (\$120.00)	-\$120.00
Total Amount	\$30.00

At the bottom, there are fields for "Billing Email" containing "ron@toto.com" and "Name as it appears on credit card (Required)" containing "Ron Westwood".

Fig. 4.3.2.30. User payment flows - Use credit book for partial payment - showcasing the current Credit Book Balance of the logged golfer

8. We will use our Credit Book to cover partial amount of the full fee

Person 1
Person 2

Date

The screenshot shows a software application window with an orange header bar. Below the header, there is a breadcrumb navigation: "1. Registration Type > 2. Golfer Information > 3. Payment". On the right side of the header is a "Exit" button. The main content area has a light gray background. At the top left of the content area, the text "demo 2" is displayed. Below this, the heading "Registration Fee" is shown, followed by the text "Current Credit Balance: \$120.00". There are two radio button options: one selected ("Use Credit Book") and one unselected ("Do not use Credit Book"). The selected option is highlighted with a red rectangular border. To the right of the content area is a vertical sidebar with a light gray background and a thin orange border. The word "HELP" is written vertically along the right edge of the sidebar, with a question mark icon at the end.

demo 2

Registration Fee

Current Credit Balance: \$120.00

Use Credit Book
(Remaining balance after applying credit: \$0.00)

Do not use Credit Book

Summary for: Ron Westwood

Description	Amount
demo 2 (\$150.00, 1 Member)	\$150.00
Credit Applied (\$120.00)	-\$120.00
Total Amount	\$30.00

Billing Email Name as it appears on credit card (Required)

Fig. 4.3.2.31. User payment flows - Use credit book for partial payment - showcasing the current Credit Book Balance of the logged golfer

9. We can see our remaining balance after applying the credit to the current event fee

Person 1

Person 2

Date

1. Registration Type > 2. Golfer Information > 3. Payment

Exit

demo 2

Registration Fee

Current Credit Balance: \$120.00

Use Credit Book
(Remaining balance after applying credit: \$0.00)

Do not use Credit Book

Summary for: Ron Westwood

Description	Amount
demo 2 (\$150.00, 1 Member)	\$150.00
Credit Applied (\$120.00)	-\$120.00
Total Amount	\$30.00

Billing Email

Name as it appears on credit card (Required)

HELP ?

Fig. 4.3.2.32. User payment flows - Use credit book for partial payment - use Credit Book option

10. We see that the Credit Applied is \$120.00

demo 2

Registration Fee

Current Credit Balance: \$120.00

Use Credit Book
(Remaining balance after applying credit: \$0.00)

Do not use Credit Book

Summary for: Ron Westwood

Description	Amount
demo 2 (\$150.00, 1 Member)	\$150.00
Credit Applied (\$120.00)	-\$120.00
Total Amount	\$30.00

Billing Email

Name as it appears on credit card (Required)

HELP ?

Fig. 4.3.2.33. User payment flows - Use credit book for partial payment - showcasing the credits applied from the credit book balance

Person 1
Person 2

Date

11. Because the Credit Book Balance does not cover the entire fee, the total amount needed to be paid is \$30

Registration Fee
Current Credit Balance: \$120.00

Use Credit Book
(Remaining balance after applying credit: \$0.00)

Do not use Credit Book

Summary for: Ron Westwood

Description	Amount
demo 2 (\$150.00, 1 Member)	\$150.00
Credit Applied (\$120.00)	-\$120.00
Total Amount	\$30.00

Billing Email: ron@test.com
Name as it appears on credit card (Required): Ron Westwood

Country (Required): Please select a country

City (Required):

Fig. 4.3.2.34. User payment flows - Use credit book for partial payment - showcasing the total amount that needs to be paid

12. After completing the Credit Card Details

Description
demo 2 (\$150.00, 1 Member)
Credit Applied (\$120.00)
Total Amount

Description	Amount
demo 2 (\$150.00, 1 Member)	\$150.00
Credit Applied (\$120.00)	-\$120.00
Total Amount	\$30.00

Billing Email: ron@test.com
Name as it appears on credit card (Required): Ron Westwood

Country (Required): Canada

Credit or debit card: VISA 1111 11 / 24 111

Cancel Pay

Fig. 4.3.2.35. User payment flows - Use credit book for partial payment - showcasing completing the test credit card details

13. Because we will have actual money in this transaction, the button will have the text Pay.

Person 1
Person 2

Date

Billing Email: ron@test.com
Name as it appears on credit card (Required): Ron Westwood
Country (Required): Canada
Credit or debit card: VISA 1111 11 / 24 111
Cancel Pay

Fig. 4.3.2.36. User payment flows - Use credit book for partial payment - finishing the registration

14. After registering, golfer is going to be redirected to the Summary Page

demo 2

Registration Fee

Receipt				
Description	Total Amount	Status	Paid on	By
Open Registration Fee for Credit book event event	\$30.00	Confirmed	05.16.2023	Ron Westwood

Done

Fig. 4.3.2.37. User payment flows - Use credit book for partial payment - showcasing the transaction details

15. If the golfer goes to the Player Dashboard

Home Tee Sheets Results Analytics Social

Credit book event Player Analytics [Player Dashboard](#)

Fig. 4.3.2.38. User payment flows - Use credit book for partial payment - showcasing the Player Dashboard

Person 1
Person 2

Date

16. And clicks on the Transactions tab

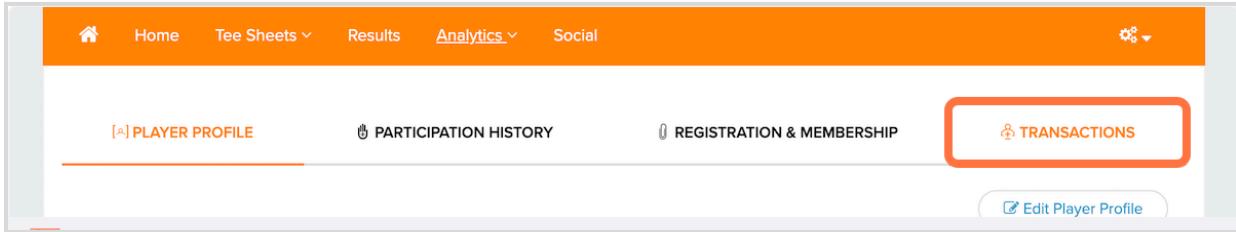


Fig. 4.3.2.38. User payment flows - Use credit book for partial payment - showcasing the Transactions tab from the Player Dashboard

17. The golfer can see the new Available balance of \$0

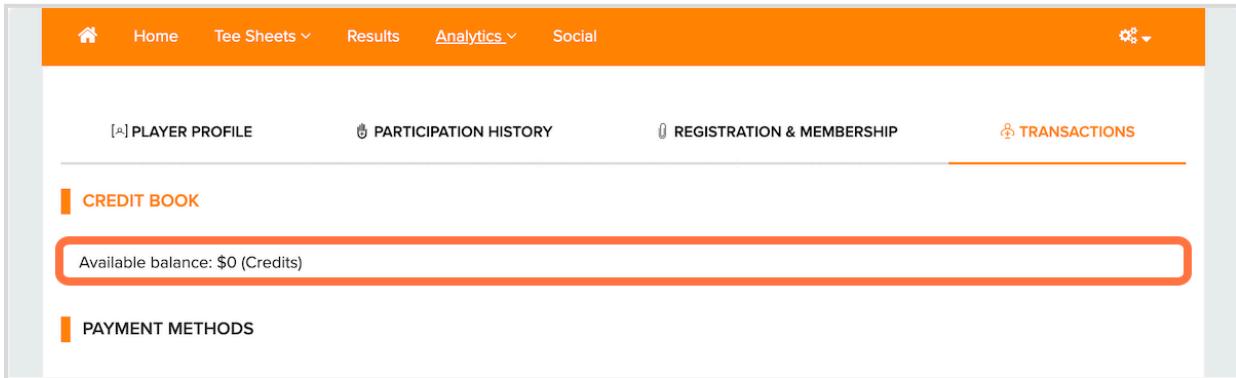


Fig. 4.3.2.39. User payment flows - Use credit book for partial payment - showcasing the final Credit Book balance after registering for the event

4.3.3. Generating balance

Users' Credit Book balance can be increased in one of the following ways:

- Canceling registration purchased with Credit Card/not purchased using Credit Book Balance
 - Payment will be refunded on Credit Card minus the cancellation fees;
- Canceling registration partially purchased using Credit Book Balance
 - Mixed payments will get the Credits refunded, as well as a refund via 3rd party payment provider, minus the cancellation fees;
- Canceling registration fully purchased using Credit Book Balance
 - Your will get full refund on your Credit Book Balance
- Manual adjustment of balance from a manager (PGA staff with an administrative functionality). Will mention this method more under the [Manually adjusting balances](#) section

Person 1
Person 2

Date

4.3.3.1. Canceling registration purchased with Credit Card

\$0 paid with Credit Book Balance

\$150 paid with Credit Card

May Event	Sheidon Salt	Open Registration Fee for May Ev...	05/15/2023, 05:21 PM	\$150.00 ⓘ	Paid / Cleared	ⓘ
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Fig. 4.3.3.1. Canceling registration with credit card - showcasing the initial transaction

1. On the Transactions Tab, the Credit Book Balance is \$0

Home	Tee Sheets	Results	Analytics	Social	⚙️
[A] PLAYER PROFILE	⌚ PARTICIPATION HISTORY	ⓘ REGISTRATION & MEMBERSHIP	ⓘ TRANSACTIONS		
CREDIT BOOK					
Available balance: \$0 (Credits)					
PAYMENT METHODS					

Fig. 4.3.3.2. Canceling registration with credit card - showcase the initial credit book balance

2. Edit Registration

Home	Tee Sheets	Results	Analytics	Social	⚙️
Register now for Credit book event					
New Registration	Click here to register.				
Edit Registration ⓘ	Click here to edit your registration.				
List of Participants	Click here to view a list of already registered golfers.				
Directory of Leagues & Events	Click here for list of other events with open registration.				

Fig. 4.3.3.3. Canceling registration with credit card - edit registration option

3. \$150 paid amount with Credit card, click on Cancel Registration

Person 1
Person 2

Date

The screenshot shows a table titled "Your Registrations". A single row is present with the following data:

	Created At	Golfers	Status	Amount	Actions
demo 2	Wed, May 10 2023	1 of 1	Confirmed	\$150.00	<button>Actions ▲</button>

A context menu is displayed over the "Actions" button, containing three options: "Edit Registration", "Print Confirmation", and "Cancel Registration". The "Cancel Registration" option is highlighted with a red rectangle.

Fig. 4.3.3.4. Canceling registration with credit card - Cancel Registration option for the initial transaction

The screenshot shows a modal dialog box asking "Are you sure you want to cancel this registration?". Below the question, it states "We will refund \$142.00 from your \$150.00 registration fee." and provides an "Event Refund Policy" note: "If cancellation occurs up to 100 days after their registration, the registrant will receive the registration fee minus \$8.00." At the bottom of the dialog are two buttons: "No" and "Yes".

Fig. 4.3.3.5. Canceling registration with credit card - Cancel registration popup with refund details

4. The registration was canceled

The screenshot shows a modal dialog box with the title "Register now for Credit book event". Inside the dialog, there is a message: "Your registration was canceled." and a "OK" button. The entire dialog box is highlighted with a red rectangle.

Person 1
Person 2

Date

Fig. 4.3.3.6. Canceling registration with credit card - the registration was canceled

5. On the Transactions Tab, the Credit Book Balance is \$0

The screenshot shows a user interface for managing registrations. At the top, there is a navigation bar with links for Home, Tee Sheets, Results, Analytics (which is currently selected), and Social. Below the navigation bar, there are four tabs: Player Profile, Participation History, Registration & Membership, and Transactions (which is highlighted with an orange border). Under the Transactions tab, there are two sections: Credit Book and Payment Methods. The Credit Book section displays the message "Available balance: \$0 (Credits)".

Fig. 4.3.3.7. Canceling registration with credit card - showcasing the final Credit Book balance

4.3.3.2. Canceling registration partially purchased using Credit Book Balance

\$120 paid with Credit Book Balance

\$30 paid with Credit Card

Credit book event	Ron Westwood	Credit Book	05/16/2023, 01:58 PM	\$120.00	Paid by Credit Book	①
Credit book event	Ron Westwood	Open Registration Fee for Credit... ①	05/16/2023, 01:58 PM	\$30.00 ①	Paid / Pending	▼

Fig. 4.3.3.8. Canceling registration partial Credit Book payment - showcasing the initial transaction

1. On the Transactions Tab, the Credit Book Balance is \$0

The screenshot shows a user interface for managing registrations. At the top, there is a navigation bar with links for Home, Tee Sheets, Results, Analytics (which is currently selected), and Social. Below the navigation bar, there are four tabs: Player Profile, Participation History, Registration & Membership, and Transactions (which is highlighted with an orange border). Under the Transactions tab, there are two sections: Credit Book and Payment Methods. The Credit Book section displays the message "Available balance: \$0 (Credits)".

Fig. 4.3.3.9. Canceling registration partial Credit Book payment - showcasing the initial transaction

2. Edit Registration

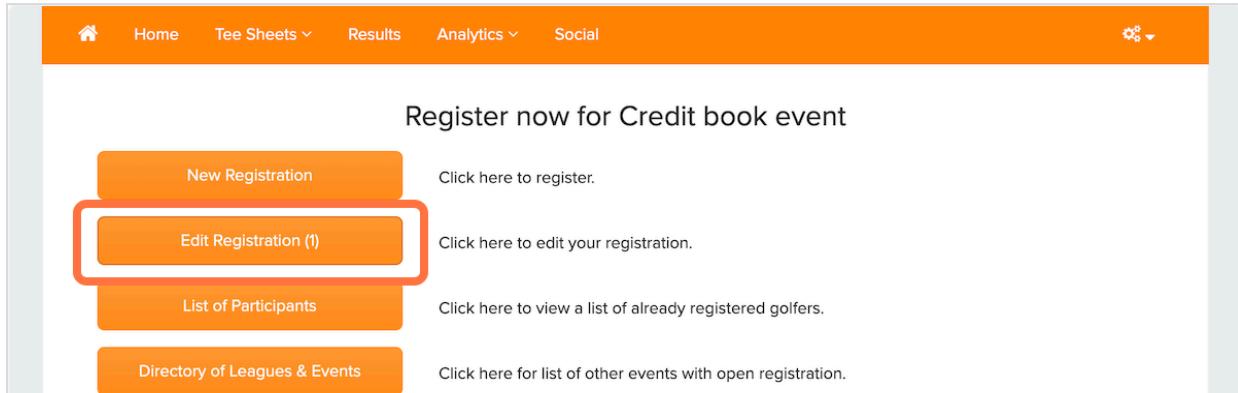


Fig. 4.3.3.10. Canceling registration partial Credit Book payment - edit registration option

3. In the current system, if a golfer has paid \$30 using their Credit Card for an event registration and then decides to cancel that registration, we have a process in place to accurately calculate and refund the appropriate amounts, including any Credit Book balance and credits.

However, as of now, our user interface only displays a pop-up with the refund details related to the Credit Card payment. This means that the golfer will only see the refund information for the \$30 paid via Credit Card, and there is no visual representation or display of the transaction details regarding the Credit Book balance and credits being refunded.

In essence, while the backend calculations and refunds are accurate, there is currently no visible indication in the golfer's interface that shows the Credit Book balance and credits being returned to their account.

We recognize this as an area for improvement, and we have plans to address this in a future update. Our goal is to provide a more comprehensive and transparent display of refund details, including all components of the refund, to ensure that golfers have a clear visual representation of how their balances are affected during the refund process.



Fig. 4.3.3.11. Canceling registration partial Credit Book payment - Cancel Registration option for the initial transaction

Person 1
Person 2

Date

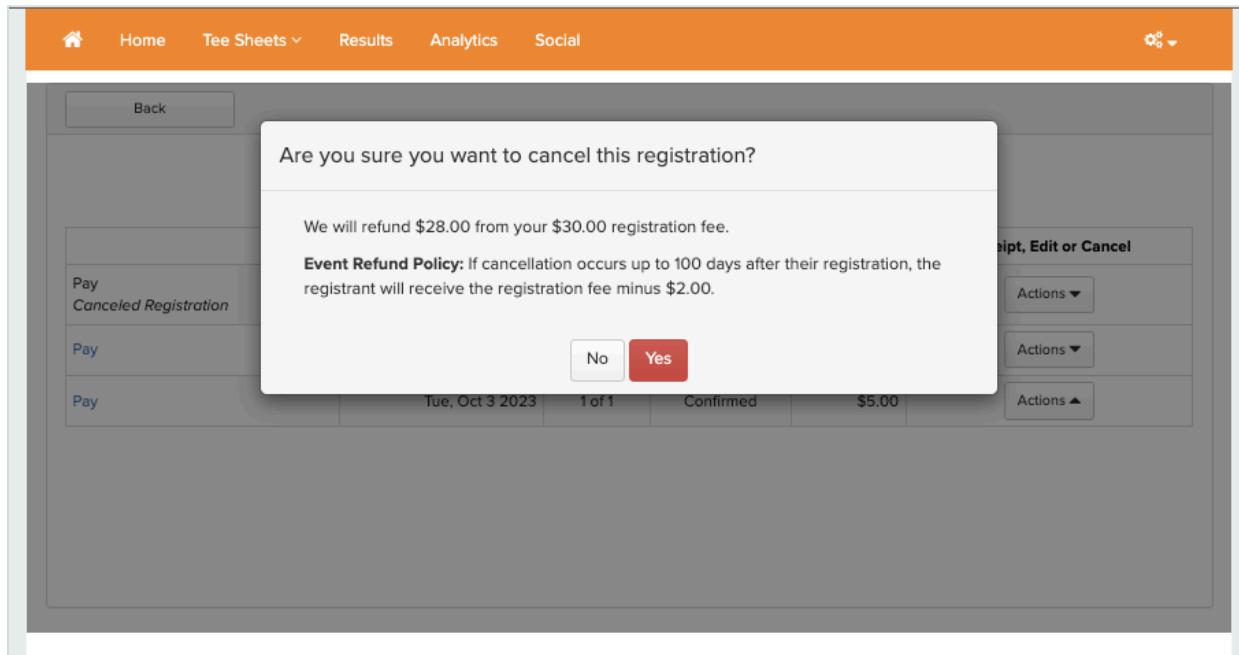


Fig. 4.3.3.12. Canceling registration partial Credit Book payment - Cancel registration popup with refund details

4. The registration was canceled

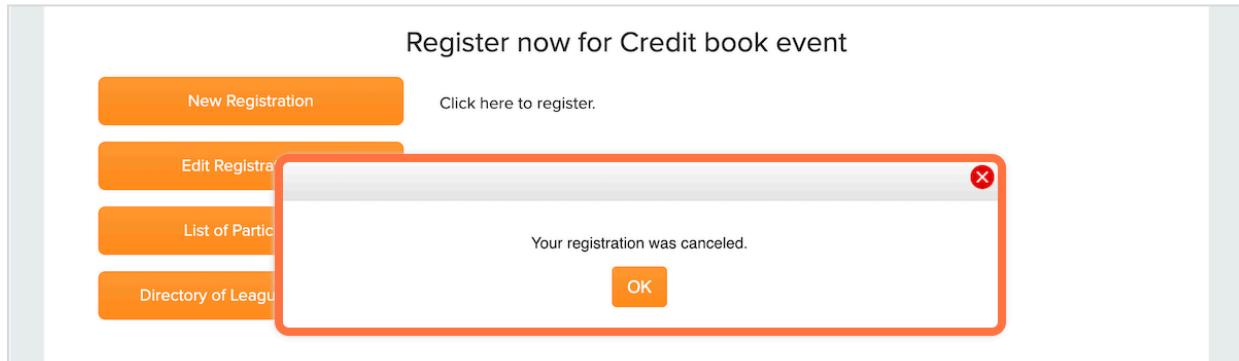


Fig. 4.3.3.13. Canceling registration partial Credit Book payment - the registration was canceled

5. On the Transactions Tab, the Credit Book Balance is \$120

Person 1
Person 2

Date

[A] PLAYER PROFILE ⚙ PARTICIPATION HISTORY 📊 REGISTRATION & MEMBERSHIP 💳 TRANSACTIONS

CREDIT BOOK

Available balance: \$120 (Credits)

Fig. 4.3.3.14. Canceling registration partial Credit Book payment - showcasing the final Credit Book balance

4.3.3.3. Canceling registration fully purchased using Credit Book Balance
\$150 paid with Credit Book Balance
\$0 paid with Credit Card

Credit book event	Adam Sandler	Credit Book	05/16/2023, 12:57 PM	\$150.00	Paid by Credit Book
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Fig. 4.3.3.15. Canceling registration partial Credit Book payment - showcasing the initial transaction

1. On the Transactions Tab, the Credit Book Balance is \$0

[A] PLAYER PROFILE ⚙ PARTICIPATION HISTORY 📊 REGISTRATION & MEMBERSHIP 💳 TRANSACTIONS

CREDIT BOOK

Available balance: \$0 (Credits)

Fig. 4.3.3.16. Canceling registration partial Credit Book payment - showcasing the initial Credit Book balance

2. Edit Registration

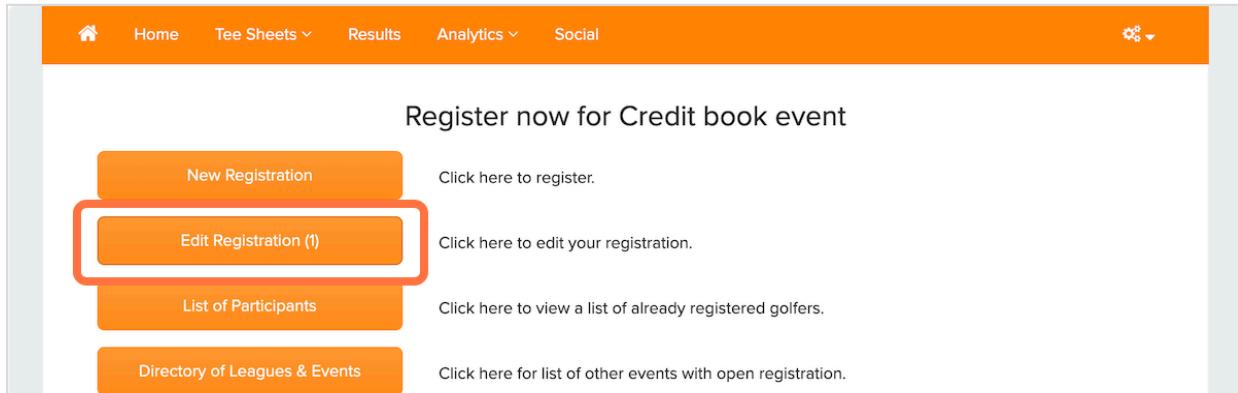


Fig. 4.3.3.17. Canceling registration partial Credit Book payment - edit registration option

3. In this scenario where a golfer has paid \$0 using their Credit Card for an event registration and then decides to cancel that registration, we have a process in place to accurately calculate and refund the appropriate amounts, including any Credit Book balance and credits.

However, as of now, our user interface only displays a pop-up with the refund details related to the Credit Card payment. This means that the golfer will only see the refund information for the \$0 paid via Credit Card, and there is no visual representation or display of the transaction details regarding the Credit Book balance and credits being refunded.

In essence, while the backend calculations and refunds are accurate, there is currently no visible indication in the golfer's interface that shows the Credit Book balance and credits being returned to their account.

We recognize this as an area for improvement, and we have plans to address this in a future update. Our goal is to provide a more comprehensive and transparent display of refund details, including all components of the refund, to ensure that golfers have a clear visual representation of how their balances are affected during the refund process.

Your Registrations					
	Created At	Golfers	Status	Amount	Actions
demo 2	Wed, May 10 2023	1 of 1	Confirmed	\$0.00	Actions ▲
					Edit Registration Print Confirmation Cancel Registration

Fig. 4.3.3.18. Canceling registration partial Credit Book payment - Cancel Registration option for the initial transaction

Person 1
Person 2

Date

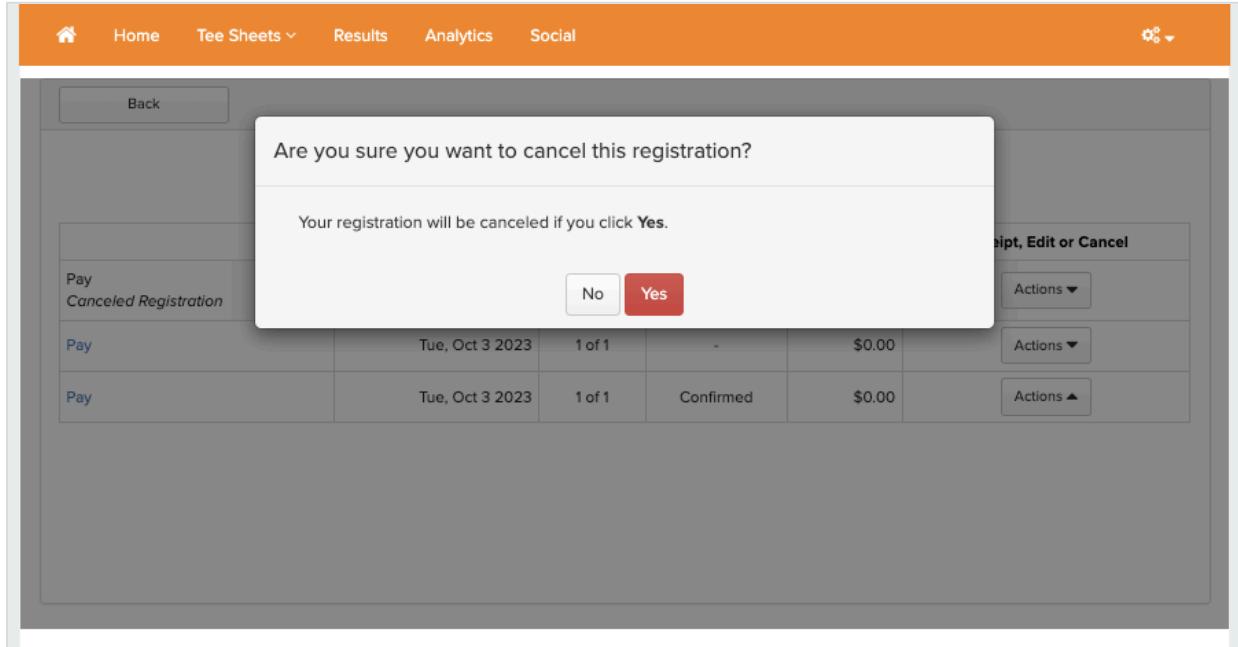


Fig. 4.3.3.19. Canceling registration partial Credit Book payment - Cancel registration popup with the confirmation message

4. The registration was canceled

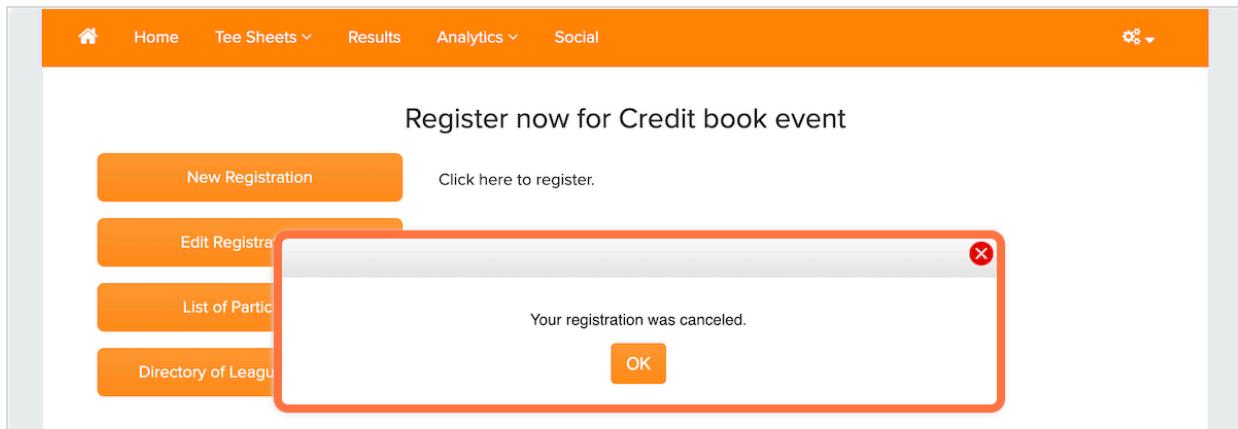


Fig. 4.3.3.20. Canceling registration partial Credit Book payment - the registration was canceled

5. On the Transactions Tab, the Credit Book Balance is \$150

Person 1
Person 2

Date

The screenshot shows a player dashboard with an orange header bar containing links for Home, Tee Sheets, Results, Analytics, Social, and a user profile icon. Below the header, there are four main tabs: [A] PLAYER PROFILE, ⚙ PARTICIPATION HISTORY, 📊 REGISTRATION & MEMBERSHIP, and 💳 TRANSACTIONS. The TRANSACTIONS tab is currently selected. Under the TRANSACTIONS tab, there is a section titled "CREDIT BOOK" which displays the message "Available balance: \$150 (Credits)". Below this, there is a "PAYMENT METHODS" section.

Fig. 4.3.3.21. Canceling registration partial Credit Book payment - showcasing the final Credit Book balance

4.3.4. Print receipt

Print receipt should be displayed in:

- Transaction history page
- Your registration page from portal
- Player dashboard from portal

4.3.4.1. Using no credit book

Using no credit book and paying with the credit card, the behavior will stay the same.

1. Select registration package

The screenshot shows a registration package selection screen. At the top, there is a navigation bar with three tabs: 1. Registration Type, 2. Golfer Information, and 3. Payment. To the right of the tabs are buttons for "Your Registrations" and "Exit". Below the tabs, there is a table with columns for "Price", "Golfers", and "Available". A row in the table is highlighted with a red border, showing "Pay2" in the "Price" column, "\$10.00 for the entire registration" in the "Golfers" column, and "1 Member" in the "Available" column. At the bottom right of the table is a red "Next" button.

Fig. 4.3.4.1. Print receipt - using no Credit Book - select registration package

2. Search and select golfer

Person 1
Person 2

Date

Fig. 4.3.4.2. Print receipt - using no Credit Book - search and select golfer

3. Fill in the registration details

Person 1
Person 2

Date

The screenshot shows a web-based registration interface for a golfer named "Josh Test (Member)". The form is divided into three main sections: "1. Registration Type", "2. Golfer Information", and "3. Payment". The "2. Golfer Information" section is currently active and highlighted with a red border. It contains fields for "Email" (joshtest@ggtest.com), "First name" (Josh), "Last name" (Test), "GHIN" (empty field), and "Handicap Index" (empty field). A note at the top right indicates that fields marked with an asterisk (*) are required. Below the form, there is a checkbox for accepting terms and conditions, followed by a "Next" button.

Fig. 4.3.4.3. Print receipt - using no Credit Book - filling the registration details

4. Insert Credit Card details

Person 1
Person 2

Date

The screenshot shows a payment interface with the following components:

- Header:** 1. Registration Type |> 2. Golfer Information |> 3. Payment
- Buttons:** Your Registrations, Exit
- Text:** Pay2
- Section:** Registration Fee
- Text:** Please donate
- Table:** Summary for: Josh Test

Description	Total Amount
Pay2 (\$10.00, 1 Member)	\$10.00
Total Amount	\$10.00

- Section:** Step 1: Billing Details

 - Name:** Josh Test
 - Address:** Der, Der, MD, US, 123
 - Billing Email:** joshtest@ggtest.com

- Section:** Step 2: Credit Card Details (highlighted with a red border)

 - Credit Card Number:** [Input field]
 - Expiration:** [Dropdown menu showing "1 - January"]
 - Year:** [Dropdown menu showing "2021"]
 - CVV:** [Input field]

- Buttons:** Cancel, Skip Payment ⓘ, Pay

Fig. 4.3.4.4. Print receipt - using no Credit Book - showcase inserting test credit card

5. Transaction successful

Person 1
Person 2

Date

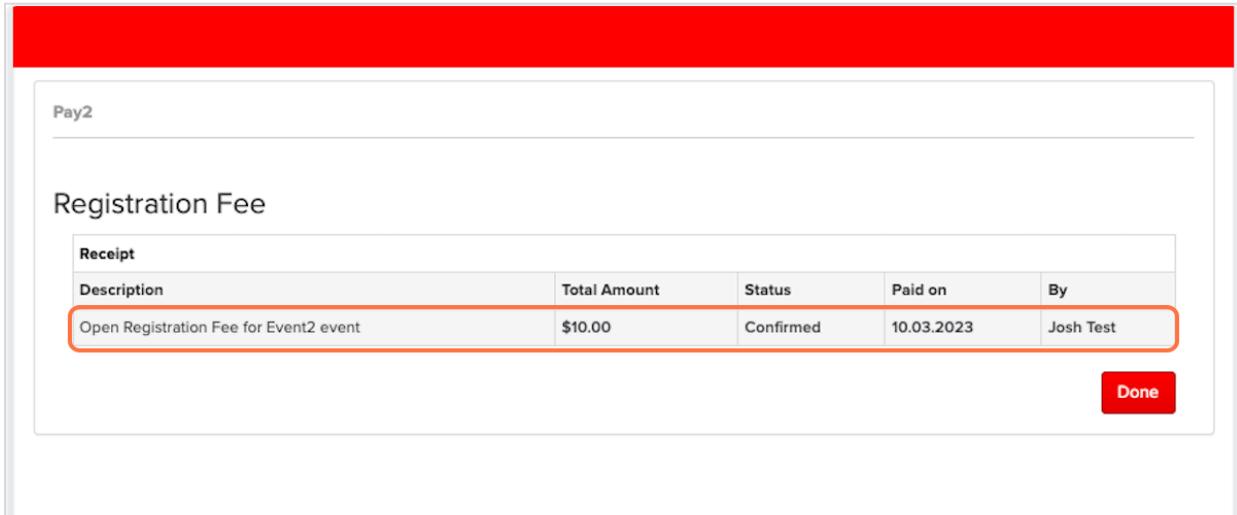


Fig. 4.3.4.5. Print receipt - using no Credit Book - showcase the successful transaction

6. Print Receipt

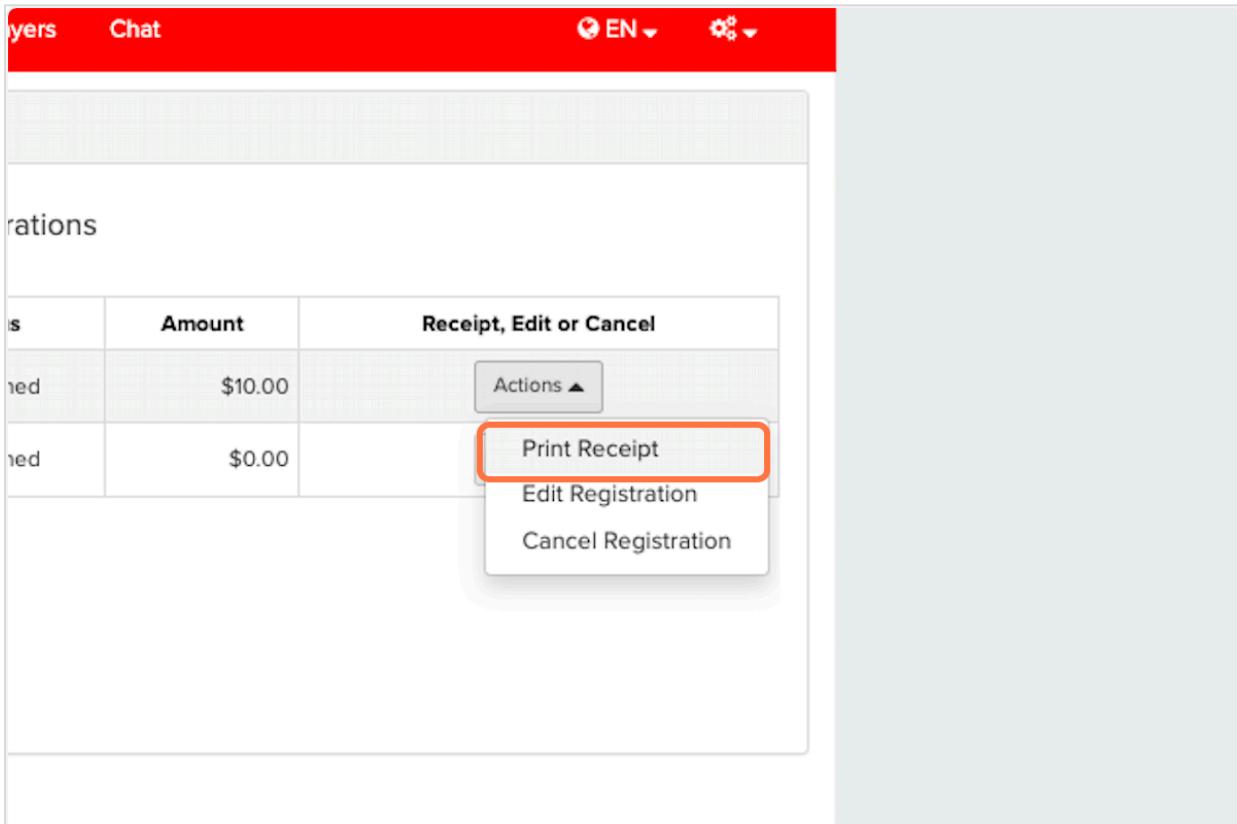


Fig. 4.3.4.6. Print receipt - using no Credit Book - option Print Receipt

7. Download Invoice

Person 1
Person 2

Date

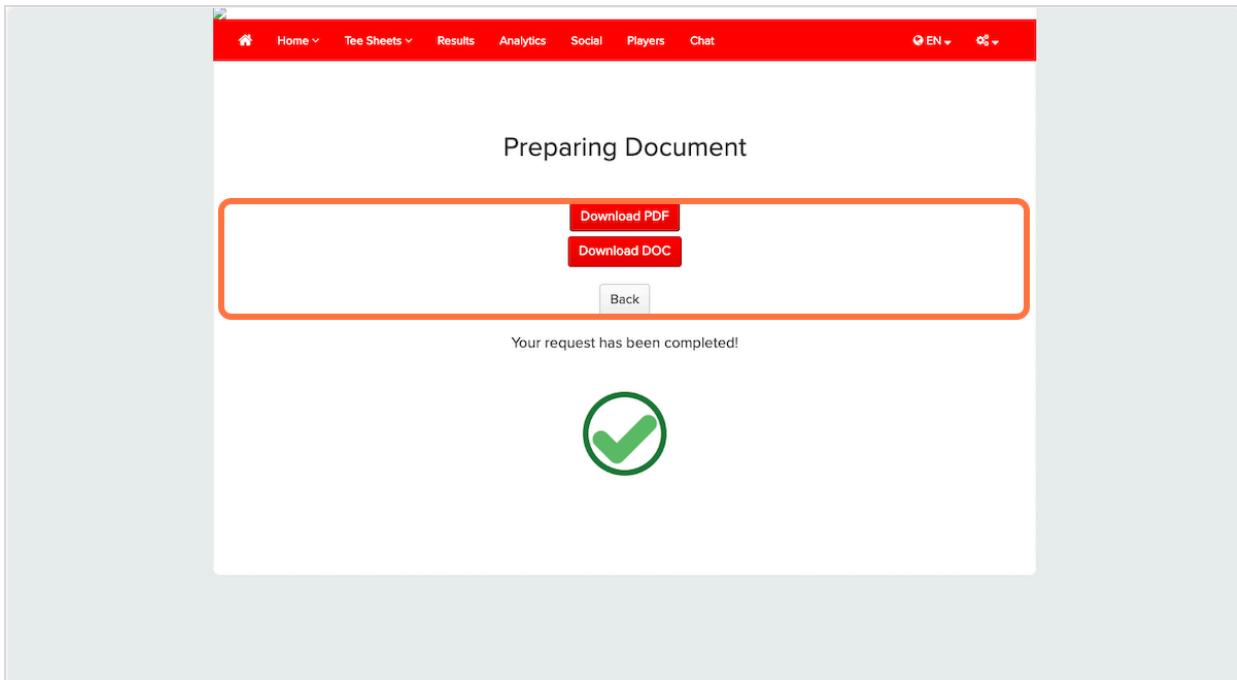


Fig. 4.3.4.7. Print receipt - using no Credit Book - option to download the invoice in your preferred format

8. Invoice

Order Number: 9942969505837785678 / Tue, Oct 3, 2023, 11:59 AM -I- Printed at: Tue, Oct 3, 2023, 12:02 PM			
Description	Golfers	Price	Total
Pay2 (\$10.00, 1 Member)	1 of 1	\$10.00	\$10.00
Golfer	Josh Test		
Total		\$10.00	\$10.00
Paid			

Fig. 4.3.4.8. Print receipt - using no Credit Book - showcase the final invoice

4.3.4.2. Using mixed payment

1. Click on New Registration

Person 1
Person 2

Date

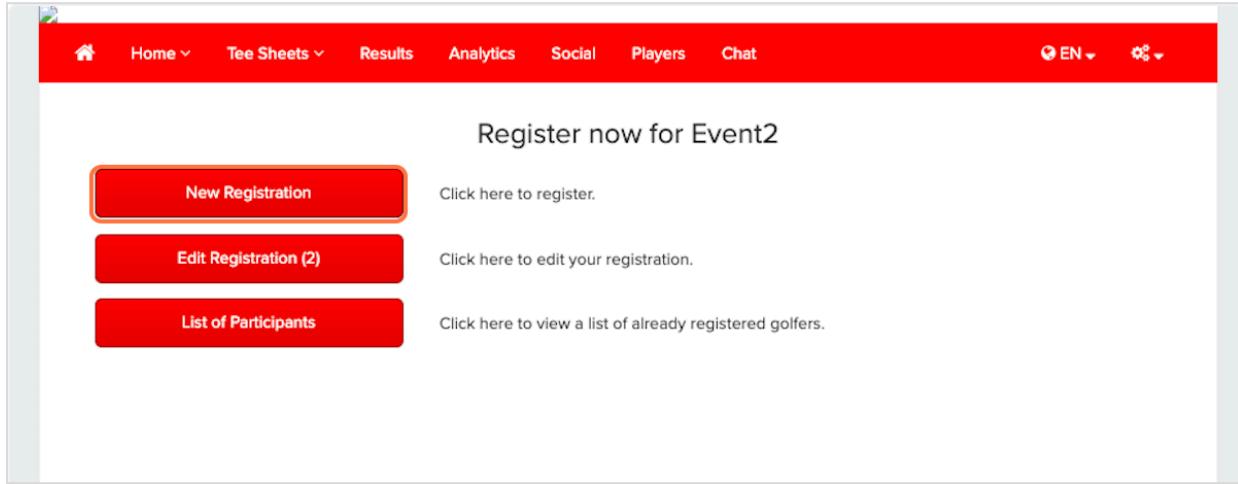


Fig. 4.3.4.9. Print receipt - using mixed payment - New Registration option

2. Select package

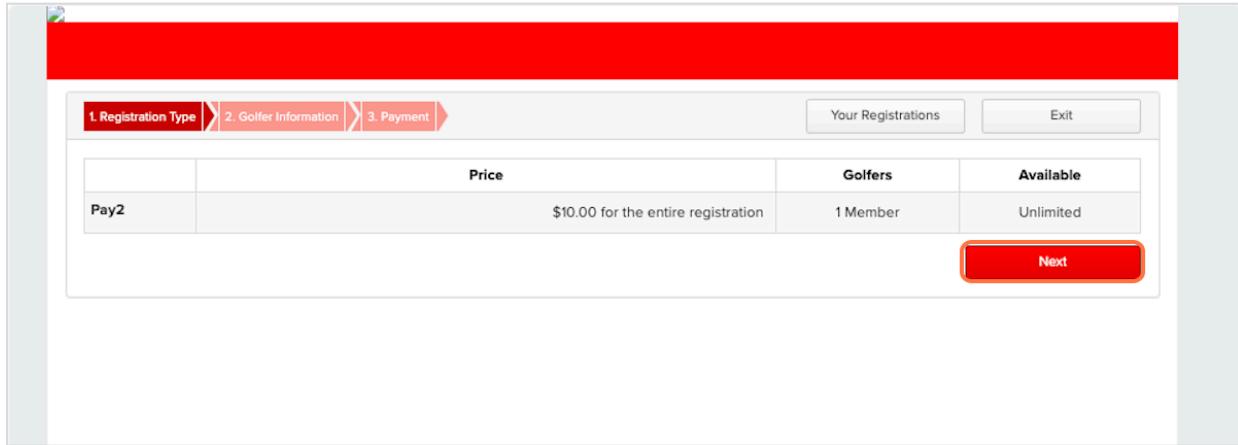


Fig. 4.3.4.10. Print receipt - using mixed payment - select registration package

3. Search and select a player

Person 1
Person 2

Date

The screenshot shows a software interface for managing registrations. At the top, there is a red header bar. Below it, a navigation bar displays 'Registration Type > 2. Golfer Information > 3. Payment'. To the right of the navigation are two buttons: 'Your Registrations' and 'Exit'. The main content area has a light gray background. A section titled 'Please Select Member' contains a dropdown menu where 'Avery Deal' is selected. A red box highlights this selection. To the right of the dropdown, a note states '* Denotes required fields'. Below this, there are input fields for 'Email' (containing 'adamsdeal3rd@gmail.com'), 'First name *' (containing 'Avery'), and 'Last name *' (containing 'Deal'). Further down, there are fields for 'GHIN' (empty) and 'Handicap Index' (containing '7.0').

Fig. 4.3.4.11. Print receipt - using mixed payment - search and select golfer

4. Current Credit Balance: \$5.00

Person 1
Person 2

Date

The screenshot shows a software application window titled "Pay2". At the top, there are three tabs: "1 Registration Type", "2 Golfer Information", and "3 Payment". The "3 Payment" tab is currently active. In the center, there is a section titled "Registration Fee" with a note "Please donate". Below it, a message says "Please select donation amount" and lists several radio button options: "No donation", "\$5.00", "\$10.00", "\$25.00", "\$50.00", "\$100.00", and "Other". An orange box highlights the text "Current Credit Balance: \$5.00". Below this, there are two radio button options: "Use Credit Book" (selected) and "Do not use Credit Book". A summary table titled "Summary for: Every Deal" is shown, detailing a transaction for "Pay2 (\$10.00, 1 Member)" with a "Total Amount" of \$10.00, "Credit Applied (\$5.00)" of -\$5.00, and a final "Total Amount" of \$5.00. At the bottom, there is a section titled "Step 1: Billing Details" with fields for "First Name (Required)" containing "Avery" and "Street Address Line 1 (Required)".

Fig. 4.3.4.12. Print receipt - using mixed payment - showcase the current credit book balance

5. Fee is \$10, the player still needs to pay \$5

Person 1
Person 2

Date

1. Registration Type » 2. Golfer Information » 3. Payment »

Your Registrations Exit

Pay2

Registration Fee

Please donate

Please select donation amount

No donation \$5.00 \$10.00 \$25.00 \$50.00 \$100.00 Other

Current Credit Balance: \$5.00

Use Credit Book
(Remaining balance after applying credit: \$0.00)

Do not use Credit Book

Summary for: Avery Deal

Description	Total Amount
Pay2 (\$10.00, 1 Member)	\$10.00
Credit Applied (\$5.00)	-\$5.00
Total Amount	\$5.00

Step 1: Billing Details

First Name (Required)
Avery

Last Name (Required)
Deal

Country (Required) ?
Please select a country

City (Required)
[empty input field]

Street Address Line 1 (Required)
[empty input field]

Street Address Line 2 (Optional)
[empty input field]

Zip Code (Required)
[empty input field]

Billing Email
adamsdeal3rd@gmail.com

Person 1

Person 2

Date

Fig. 4.3.4.13. Print receipt - using mixed payment - showcase the credits applied and the total amount left to be paid

6. Insert Credit Card Details

er applying credit: \$0.00

k

	Total Amount
	\$10.00
	-\$5.00
	\$5.00

Details Step 2: Credit Card Details

Credit Card Number
4111 1111 1111 1111

Expiration
1 - January ▾
2027 ▾

CVV
123

Next Step Cancel

Fig. 4.3.4.14. Print receipt - using mixed payment - showcase inserting test credit card

7. Transaction successful

Person 1
Person 2

Date

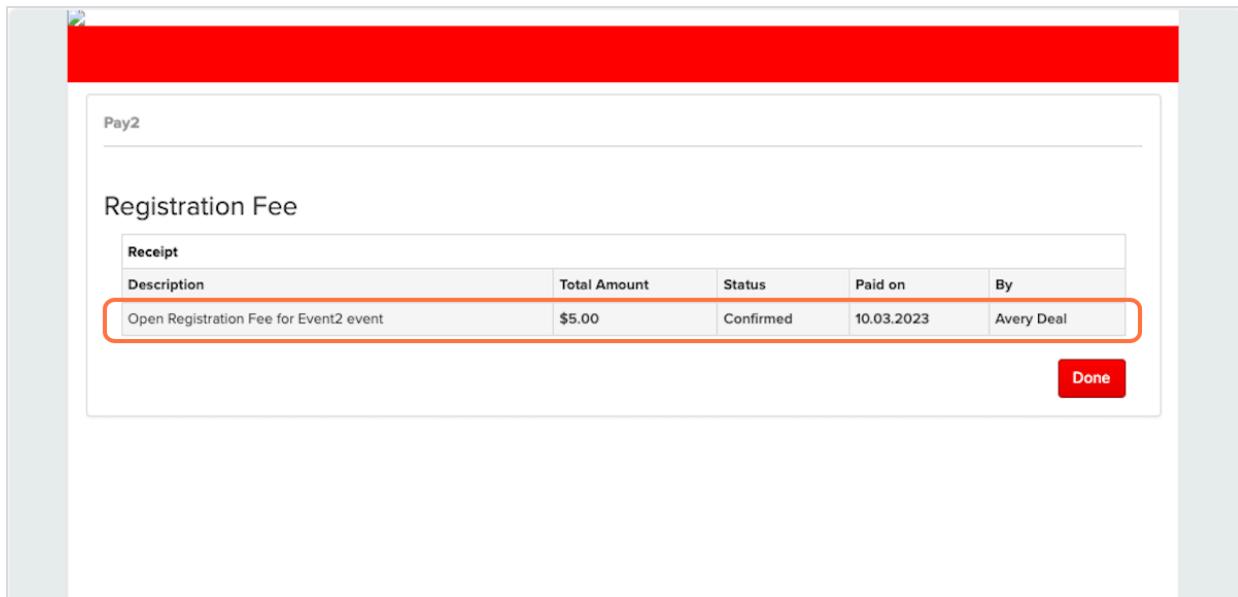


Fig. 4.3.4.15. Print receipt - using mixed payment - showcase the successful transaction

8. Print Receipt

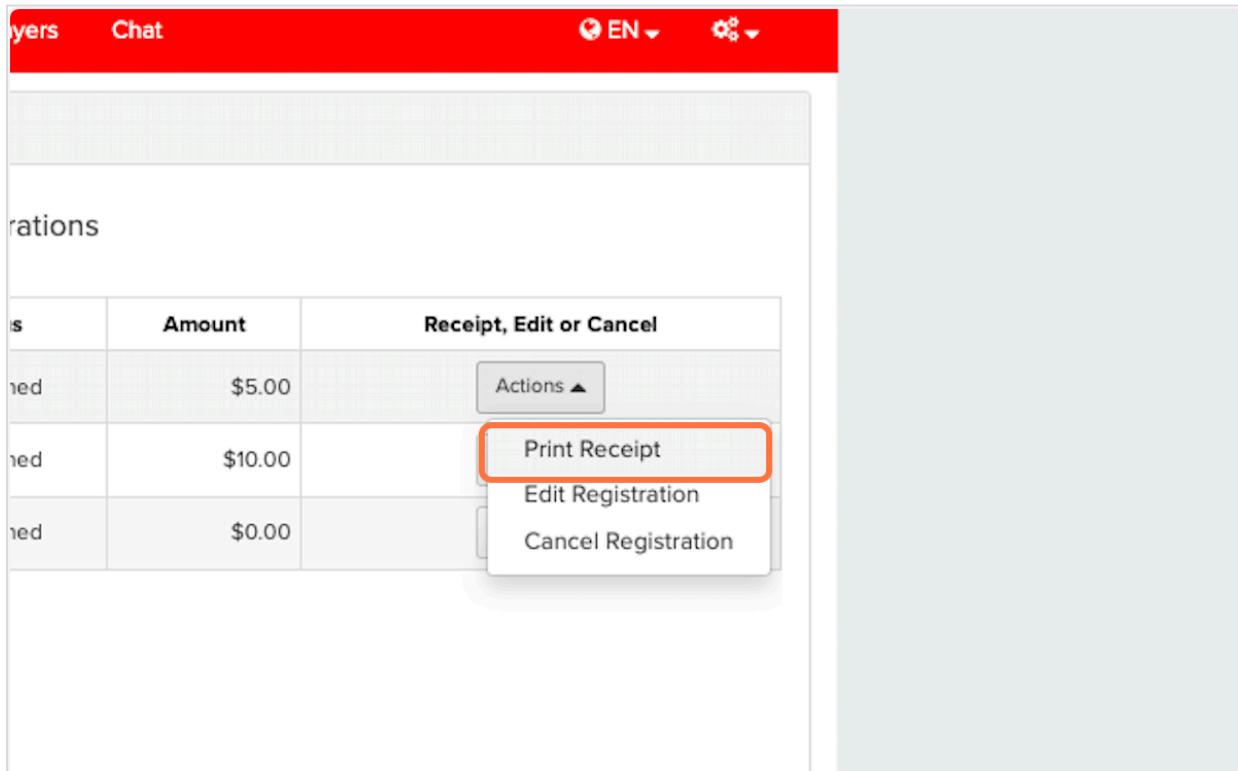


Fig. 4.3.4.16. Print receipt - using mixed payment - option Print Receipt

9. Invoice

Person 1

Person 2

Date

Event2			
Receipt for Rafael Ardeleanu			
Order Number: 9943000286123565648 / Tue, Oct 3, 2023, 12:14 PM -I- Printed at: Tue, Oct 3, 2023, 12:18 PM			
Description	Golfers	Price	Total
Pay2 (\$10.00, 1 Member)	1 of 1	\$10.00	\$10.00
Golfer	Avery Deal		
Credit Book			-\$5.00
Total			\$5.00
Paid			\$5.00

Fig. 4.3.4.17. Print receipt - using mixed payment - showcase the final invoice

4.3.4.3. Using only Credit book

We do not currently offer printed receipts for payments made exclusively through credit books. However, we are actively working on incorporating this feature into an upcoming release. You can see more details on the Future Work section.

1. Click on New Registration

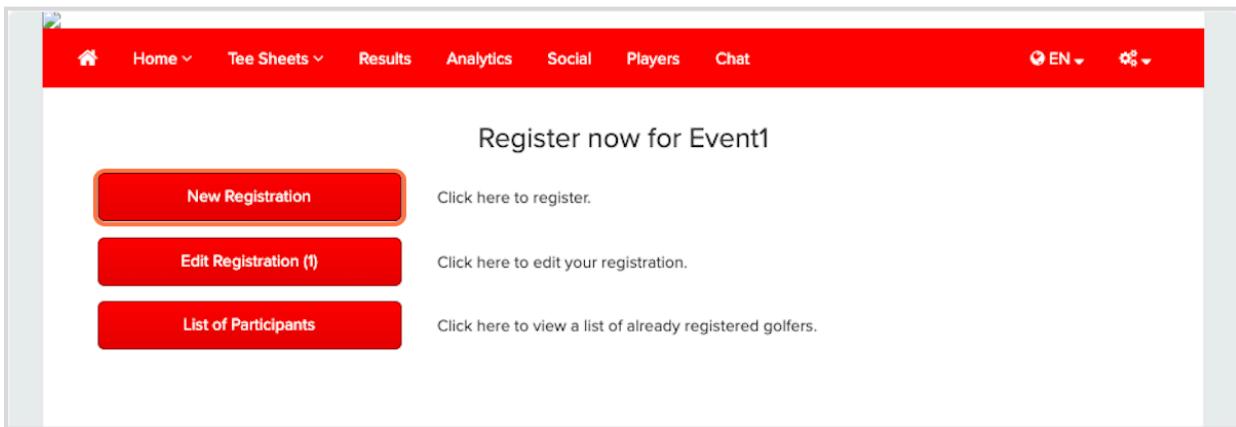


Fig. 4.3.4.18. Print receipt - using only Credit Book - new registration option

2. Select package

Person 1
Person 2

Date

	Price	Golfers	Available
Pay1	\$10.00 for the entire registration	1 Member	Unlimited

Fig. 4.3.4.19. Print receipt - using only Credit Book - select registration package

3. Search for a Member

Pay1

▲ (Member) Required Hide Player Details

Please Select Member

Search for a Member

I acknowledge that Golf Genius Software will save and process the information provided here, subject to the Golf Genius Terms of Service and [Privacy Policy](#)

Fig. 4.3.4.20. Print receipt - using only Credit Book - showcase searching a member

4. Select a player

Person 1
Person 2

Date

The screenshot shows a software interface for selecting a member. At the top, there is a red header bar. Below it, a navigation bar with three tabs: "1. Registration Type" (highlighted in blue), "2. Golfer Information" (highlighted in green), and "3. Payment" (highlighted in red). To the right of the tabs are two buttons: "Your Registrations" and "Exit".

The main area is titled "Pay1". Below it, there is a section labeled "▲ (Member)" with a "Required" field and a "Hide Player Details" button. A search bar is labeled "Search for a Member" with the text "victor" entered. A dropdown menu lists several names:

- Joseph Victoria
- Joseph Victoria1
- Victoria Cui** (This name is highlighted with an orange rectangle.)
- Victoria Cui1
- Victoria Davis
- victoria feng

To the left of the search bar, there is a checkbox labeled "I acknowledge that Golf Genius Software will subject my information to the Golf Genius Terms of Service and [Privacy Policy](#)".

At the bottom right of the main area is a red "Next" button.

Fig. 4.3.4.21. Print receipt - using only Credit Book - showcase searching and selecting a member

5. Pay using only Credit Book

Person 1
Person 2

Date

1. Registration Type |> 2. Golfer Information |> 3. Payment |>

Your Registrations Exit

Pay1

Registration Fee

Please donate

Please select donation amount

No donation \$5.00 \$10.00 \$25.00 \$50.00 \$100.00 Other

Current Credit Balance: \$16.00

Use Credit Book
(Remaining balance after applying credit: \$6.00)

Do not use Credit Book

Summary for: Victoria Cui

Description	Total Amount
Pay1 (\$10.00, 1 Member)	\$10.00
Credit Applied (\$10.00)	-\$10.00
Total Amount	\$0.00

Cancel Register

Fig. 4.3.4.22. Print receipt - using only Credit Book - showcase the credits applied and the total amount left

6. The option is not yet visible for the players

Person 1
Person 2

Date

	Created At	Golfers	Status	Amount	Receipt, Edit or Cancel
PayI	Tue, Oct 3 2023	1 of 1	Confirmed	\$0.00	<button>Actions ▾</button>
PayI	Wed, Sep 20 2023	1 of 1	Confirmed	\$0.00	<button>Edit Registration</button> <button>Cancel Registration</button>

Fig. 4.3.4.23. Print receipt - using only Credit Book - Print receipt option will not yet be available for the players

7. Going into Transaction History page

TRANSACTIONS &
REGISTRATION

SEASON
MANAGEMENT

PAYMENTS
CENTER

Billing & Account

Donations

Refund Policies

Transaction History

Credit Book

Payment Gateways

Sort By

Start Date

Fig. 4.3.4.24. Print receipt - using only Credit Book - showcase going to Transaction History page

Person 1
Person 2

Date

8. We have the row entry on Transaction History

Event :	Player :	Description :	Date and Time	Amount :	Status :	Actions
Event1	Victoria Cui	Open Registration Fee for Event1...	10/03/2023, 11:21 AM	\$0.00	Paid by other means	<input type="button" value="▼"/>
Event1	Victoria Cui	Credit Book	10/03/2023, 11:21 AM	\$10.00	Paid by Credit Book	<input type="button" value="▼"/>
Event1	Brian Test	Open Registration Fee for Event1...	10/03/2023, 11:17 AM	\$0.00	Paid by other means	<input type="button" value="▼"/>
Event1	Brian Test	Credit Book	10/03/2023, 11:17 AM	\$10.00	Paid by Credit Book	<input type="button" value="▼"/>

Fig. 4.3.4.25. Print receipt - using only Credit Book - showcase the new Transaction History entry

9. But, we do not have any option to view the invoice for the moment

TOTAL		
2		
\$0.00		
Amount :	Status :	Actions
\$0.00	Paid by other means	<input type="button" value="▼"/>
\$10.00	Paid by Credit Book	<input type="button" value="▲"/> Refund <input type="button" value="▼"/>
\$0.00	Paid by other means	<input type="button" value="▼"/>
\$10.00	Paid by Credit Book	<input type="button" value="▼"/>

Fig. 4.3.4.26. Print receipt - using only Credit Book - showcase the available action options

10. Going into Credit Book page

Person 1
Person 2

Date

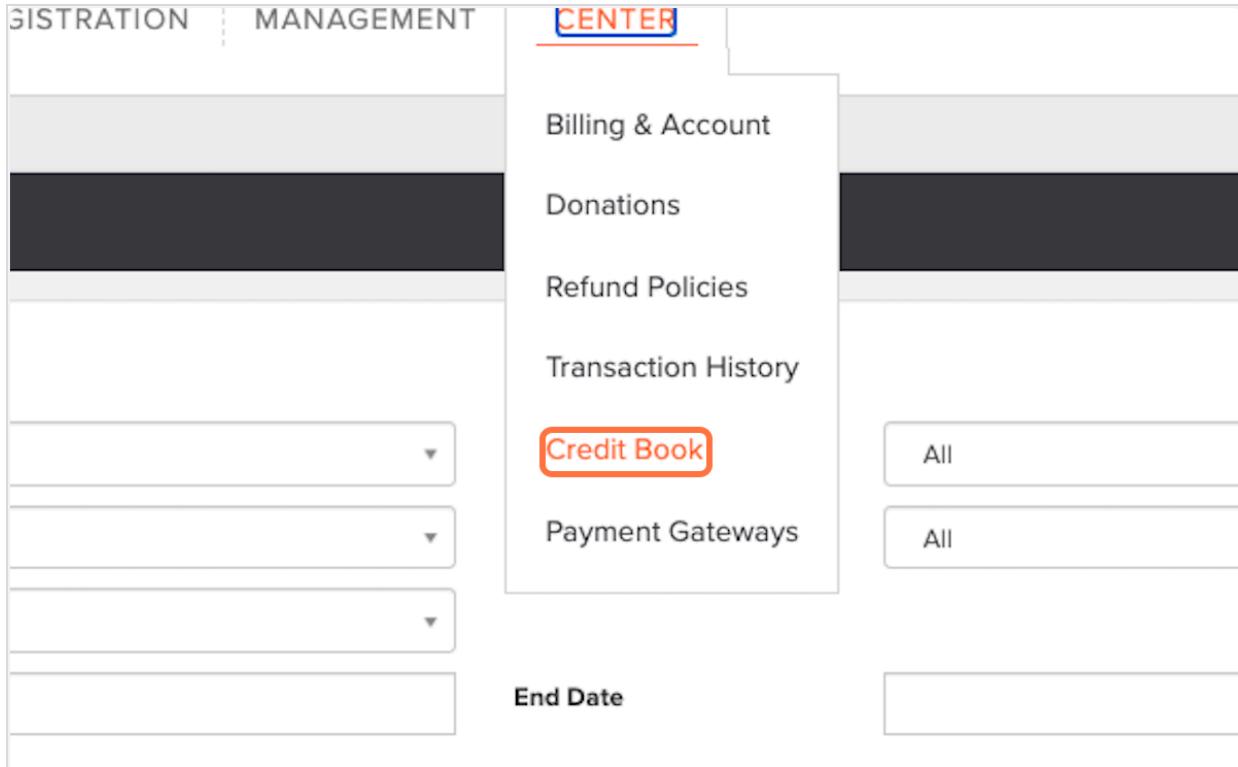


Fig. 4.3.4.27. Print receipt - using only Credit Book - showcase going to Credit Book page

11. We have the row entry on Credit Book

Adam Anderson		\$11.00	Adjust Balance			
Adam Sailor		\$15.00	Adjust Balance			
Aiden Dinari		\$2.00	Adjust Balance			
Aiden So		\$7.00	Adjust Balance			
Andrei Vasiluta		\$10.00	Adjust Balance			
Avery Deal		\$5.00	Adjust Balance			
Brian Test		\$15.00	Adjust Balance			
Griffin Barnett		\$7.00	Adjust Balance			
Joann Bee		\$11.00	Adjust Balance			
Joshua Groom		\$900,000,000,000,000,000,000,000.00	Adjust Balance			
Lucius Nielsen		\$10.00	Adjust Balance			
Victoria Cul		\$6.00	Adjust Balance			
ID	Date / Time ▾	Event	Details	Type	Amount	Total Credits Balance ⓘ
1798	10/03/2023, 11:21 AM	Event1	Open Registration Fee for Event1	Payment	(\$10.00) ⓘ	\$6.00
1568	08/23/2023, 10:41 AM	Manual Adjustment	N/A ⓘ	Manual Adjustment	(\$5.00)	\$16.00
1567	08/23/2023, 12:00 AM	Manual Adjustment	N/A ⓘ	Manual Adjustment	(\$1.00)	\$11.00

Fig. 4.3.4.28. Print receipt - using only Credit Book - showcase the new Credit Book entry

4.4. Limitations

As payments are made within a Customer's account (via 3rd party payments providers) and Credits are received from refunding these payments, we cannot allow Credits to be used cross-customers.

Person 1
Person 2

Date

This translates to players having one Credit Book object (balance) per customer. Each player has their own Credit Book balance. This balance is like a personal wallet, recording their financial transactions and the credits they receive from refunds. These credits are exclusive to each customer and cannot be shared or used by others.

4.5. Payment gateways supported

In our current implementation, for the initial release of the Credit Book feature, we provide support for two payment gateways: Stripe and AFS. These payment gateways enable users to make payments and handle financial transactions seamlessly within our platform.

It's worth noting that our approach is dynamic and customer-centric. As we continue to develop this feature, we remain open to expanding our list of supported payment gateways based on the evolving needs of our customers. This means that in the future, we have the flexibility and capability to integrate additional payment gateways as required, ensuring that our platform remains adaptable and responsive to the preferences and requirements of our user base.

5. Feature Integration

5.1. Refund Entire Event

Depending on how the payment was made:

- Unchecked (refund based on how the payment was made initially):
 - CC to CC
 - CB to CB
 - *Note: cancellation fee comes out of the CC first, CB second*
- Checked:
 - Refund all to CB

1. Click on Registration Payments

Person 1
Person 2

Date

The screenshot shows the Golf Genius software interface. At the top, there is a navigation bar with links for EVENT, GOLFERS, CALENDAR, ROUNDS, APPS, NAVIGATOR, Customer Center, and My account. The system status is shown as Normal. Below the navigation bar, the user's name 'Pirvu Cristian' and the current page 'Credit book - refund - no ... Dashboard' are displayed. The main content area is titled 'Registration Payments' and contains several sections: 'EVENT ADMINISTRATION' (Event Profile, Course Details, Custom Fields, Payment Center, Registration Center, Registration Payments), 'MULTI-ROUND TOOLS' (Multi-Round Series, Round Robin Schedule, Bracket Tournaments, Multi-Round Tournaments, Event Standings), 'EVENT MANAGERS' (Add / Remove / Reinvite Manager), and 'CUSTOMER MANAGERS' (Customer Manager). A message 'Registration is open. Close' is visible. A note at the bottom right says 'PERSONALIZE YOUR EVENT Logos, Banners & Backgrounds Photo Gallery Event Talk Manager Forum'. The 'Registration Payments' link is highlighted with a red box.

Fig. 5.1.1. Refund Entire Event - Registration Payment action

2. Click on Registration Report

The screenshot shows the 'Registration Report' section of the Golf Genius software. The top navigation bar and user information are identical to the previous screenshot. The main content area starts with a message 'Please select your preferred payment gateway' with options for Stripe and AFS (selected). Below this, a note states 'We will be using AFS to process payments. You will use your own AFS account where you have full access over your funds: transfers, refunds and analytics.' A 'Payment Gateway' dropdown menu is set to 'GolfGeniusTEST'. On the right side, a large button labeled 'Registration Report' is highlighted with a red box. Below this, there are tabs for 'Registration Options' (selected), 'Add-ons', and 'Additional Options'. A 'New Registration Option' button is visible. A table lists a single registration option: 'Registration Option' is 'Pay (\$5.00, 1 Member)', 'Purchased' is '2 / Unlimited', and there are 'Edit | Delete' links.

Fig. 5.1.2. Refund Entire Event - Registration Report action

3. Click on Refund Entire Event

Person 1
Person 2

Date

The screenshot shows the 'Golf Genius' software interface. At the top, there's a navigation bar with links for 'EVENT', 'GOLFERS', 'CALENDAR', 'ROUNDS', and 'APPS'. On the right side of the header, there are links for 'NAVIGATOR', 'Customer Center', and 'My account'. Below the header, there's a search bar and a status message 'System Status: Normal'. The main content area is titled 'REGISTRATIONS' and contains a table with columns for Registrant Name, Email Addresses, Registration Option, Amount, Date, Players, Canceled, and Actions. Three rows of data are listed: Adam Sailor (Pay \$6.00), Benjamin Al-Khaffaf (Pay \$0.00), and Rafael Ardeleanu (Pay \$5.00). A 'Download XLS' button is visible, and a 'Refund Entire Event' button is highlighted with a red box. To the right of the table, there's a vertical 'HELP' icon. Below the registration table, there's a section titled 'PROCESSED REFUNDS' with a similar table structure.

Fig. 5.1.3. Refund Entire Event - Registration Report - Refund Entire event action

4. The full amount option will refund full amount of money to the golfers

This screenshot shows a modal dialog box titled 'Select Amount to Refund'. It contains a note about AFS requirements for large refunds. Below the note, there are three options: 'Full Amount' (selected and highlighted with a red box), 'Fixed Amount', and 'Percentage'. Underneath these options, there are two checked checkboxes: 'Remove players from roster' and 'Refund To Credit Book'. At the bottom of the dialog, there's a note about calculating refund amounts and buttons for 'Cancel' and 'Next'.

Fig. 5.1.4. Refund Entire Event - Refund option: full amount

5. The fixed amount option will refund a fixed amount of money to the golfers

Person 1
Person 2

Date

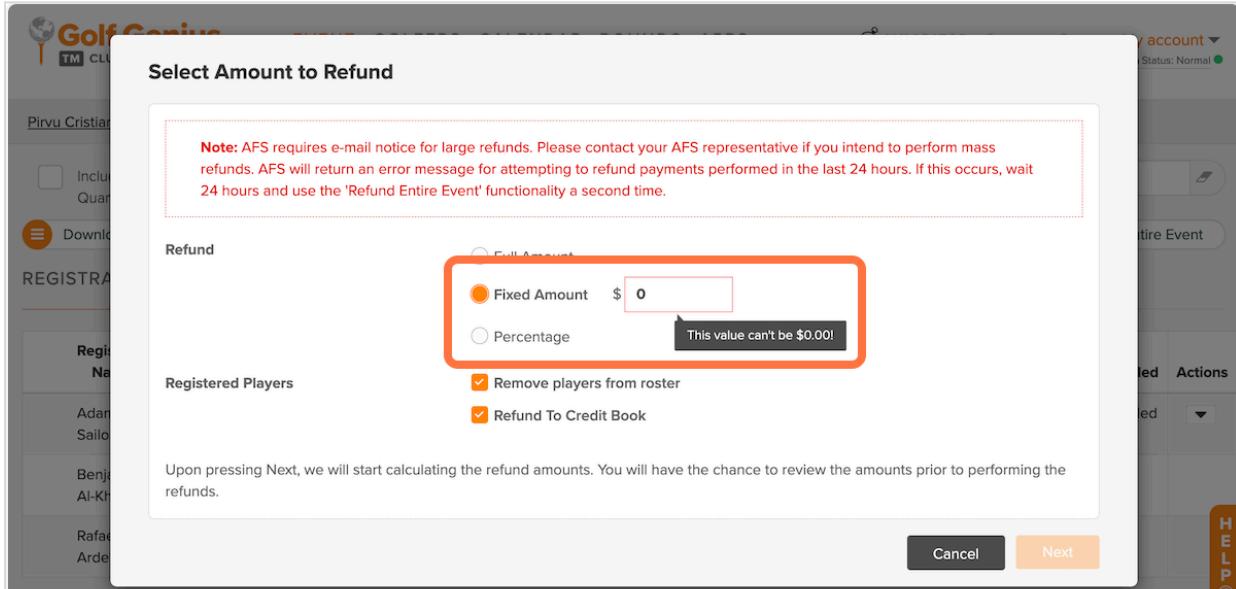


Fig. 5.1.5. Refund Entire Event - Refund option: fixed amount with validator

6. The percentage amount option will refund a percentage amount of money to the golfers

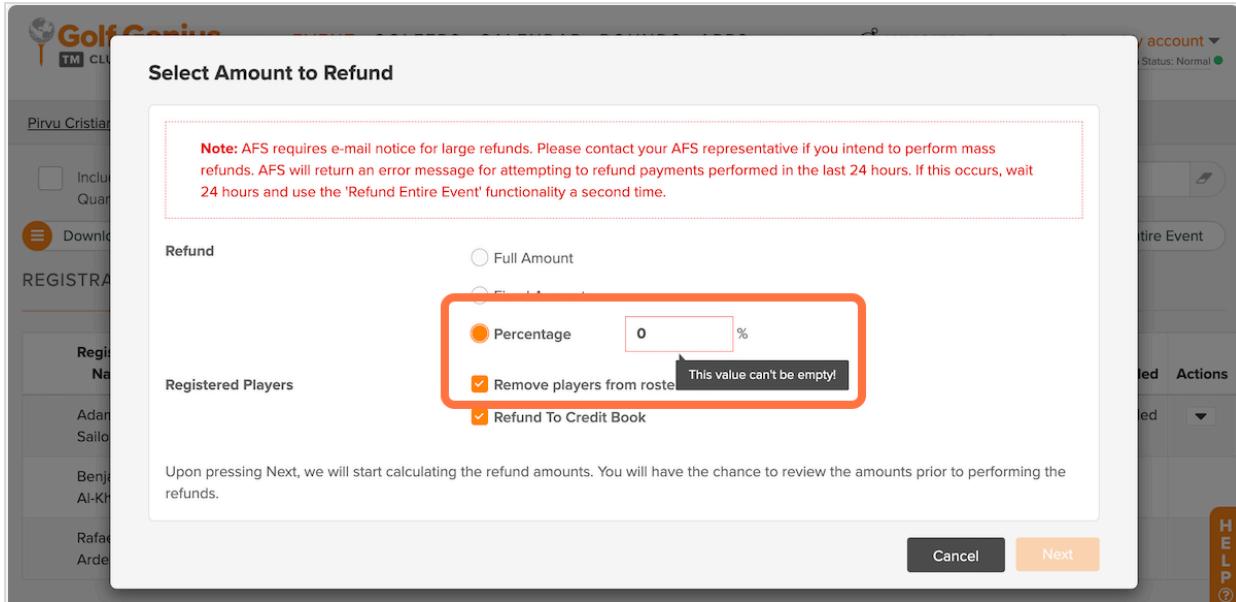


Fig. 5.1.6. Refund Entire Event - Refund option: percentage with validator

7. Selecting the Remove players from roster will automatically remove the players from the roster

Person 1
Person 2

Date

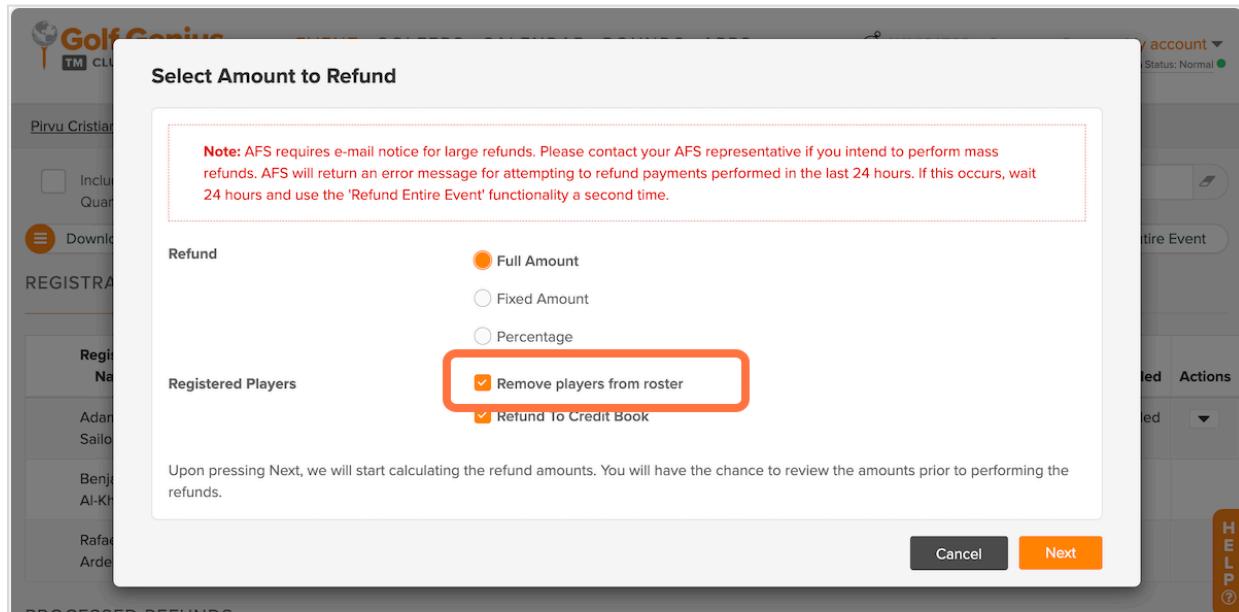


Fig. 5.1.7. Refund Entire Event - Registered Players: Remove players from roster selected

8. Selecting Refund To Credit Book will automatically refund the players the credit to the respective credit book balance

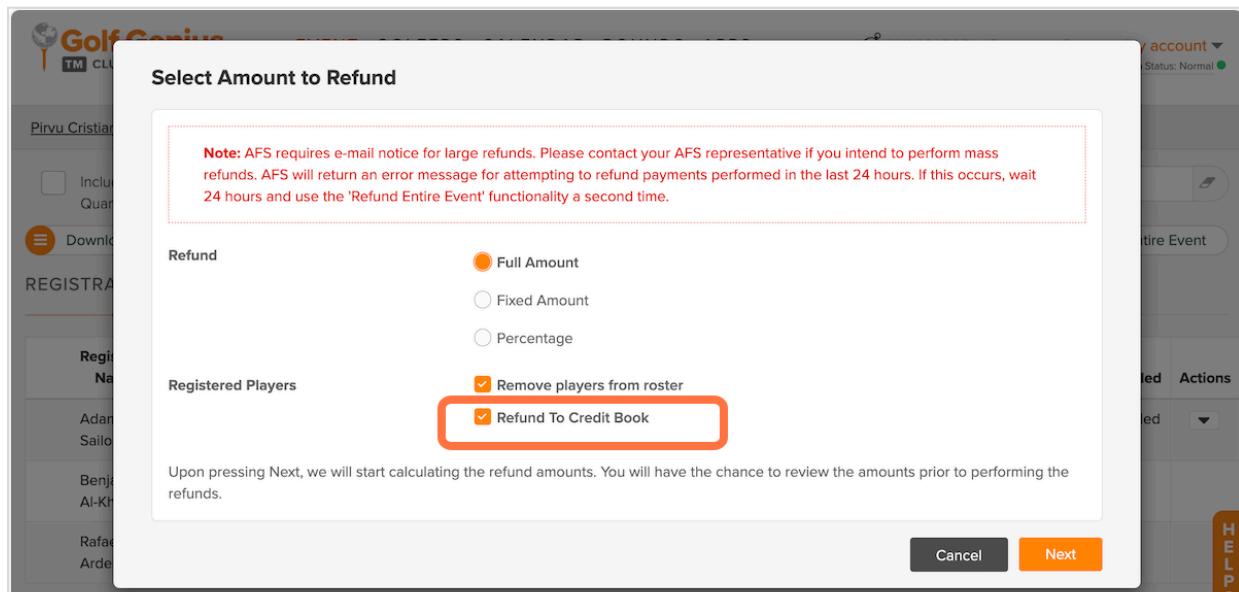


Fig. 5.1.8. Refund Entire Event - Registered Players: Refund to Credit Book selected

9. Refunds Summary table

Person 1
Person 2

Date

The screenshot shows the Golf Genius software interface. At the top, there's a navigation bar with links for EVENT, GOLFERS, CALENDAR, ROUNDS, APPS, NAVIGATOR, Customer Center, and My account. Below the navigation is a breadcrumb trail: Pirvu Cristian > Credit book - refund - no ... Dashboard > Event > Payment Center > Registration Payments > Registration Report. A red box highlights the 'REFUNDS TO PROCESS' section. Inside this section, a message says 'Please review the amounts to be refunded below. Clicking 'Process Refunds' will initiate the refund process.' Below the message is a table with the following data:

Registrant Name	Email Adresses	Registration Option	Amount	Amount to Refund	Date	Players
Brian Test	briant@gmail.com	Pay	\$3.00	\$2.00 ⓘ	05.11.2023	No Golfers in Roster
Adam Sailor	adams@gmail.com	Pay	\$6.00	\$6.00	05.11.2023	No Golfers in Roster
Brian Test	briant@gmail.com	Pay	\$4.00	\$1.00 ⓘ	05.11.2023	No Golfers in Roster
Total			\$13.00	\$9.00		

Fig. 5.1.9. Refund Entire Event - Showcase the registration report page with the refunds summary table

5.2. Donations

It's important to note that the Credit Book feature **does not support refunds for donations**. When a user makes a donation through the platform, this amount cannot be refunded directly to their Credit Book balance.

Furthermore, when considering the registration payment form, donations are not eligible for Credit Book discounts. Credit Book discounts are exclusively applied to the registration fee and do not extend to other items, such as donations.

For clarity, let's illustrate this with an example:

Suppose a user is registering for an event with the following details:

Registration Fee: \$50

Donation: \$20

Credit Book Balance: \$80

In this scenario, if the user chooses to use their Credit Book to pay for the registration:

Person 1
Person 2

Date

- The registration fee (\$50) will be covered by the Credit Book balance.
- However, the donation amount (\$20) remains unaffected by the Credit Book, and the user will still be required to pay this \$20 separately.
- After completing the transaction, the user's Credit Book balance will be reduced to \$30, reflecting the remaining balance after covering the registration fee and excluding the donation amount.

This approach ensures transparency and accuracy in handling Credit Book discounts and donations, providing users with a clear understanding of how their balances are applied in various payment scenarios.

Donation and Payment Process:

Users registering for an event have the flexibility to choose whether or not they wish to make a donation during the registration process.

5.2.1. No Donation Option Selected:

If a user opts not to make a donation, the registration process proceeds as normal. In this case, the user can utilize their Credit Book to cover the entire registration cost, provided they have a sufficient balance.

Person 1
Person 2

Date

1. Registration Type > 2. Golfer Information > 3. Payment

Your Registrations Exit

Pay

Registration Fee

Please donate

Please select donation amount

No donation \$5.00 \$10.00 \$25.00 \$50.00 \$100.00 Other

Current Credit Balance: \$10.00

Use Credit Book
(Remaining balance after applying credit: \$0.00)

Do not use Credit Book

Summary for: Andrei Vasiluta

Description	Total Amount
Pay (\$10.00, 1 Member)	\$10.00
Credit Applied (\$10.00)	-\$10.00
Total Amount	\$0.00

Cancel Register

Fig. 5.2.1.1. Donations - No donation option select

5.2.2. Donation Option Selected:

If a user selects any donation option during registration, a different process comes into play: The user is required to make the selected donation payment using their Credit Card, even if they have a sufficient Credit Book balance to cover the full registration amount.

Date

Description	Total Amount
Pay (\$10.00, 1 Member)	\$10.00
Donation	\$25.00
Credit Applied (\$10.00)	-\$10.00
Total Amount	\$25.00

Fig. 5.2.1.2. Donations - Donation option select

5.3. Add-ons

It's essential to note that registrations that include any type of **Add-ons will not be compatible with Credit Book usage** in the initial implementation of this feature. This restriction will serve as a secondary phase of the feature and will be implemented in subsequent iterations.

However, there is an exception to this rule. If the Additional Quantity for an Add-on is set to 0 during the registration process, the user will still have the option to utilize their Credit Book for that specific registration. In other words, when no additional quantities of Add-ons are selected (i.e., set to 0), the Credit Book can be applied for covering the registration cost.

This approach allows us to gradually incorporate Credit Book support for Add-ons in future iterations while providing users with flexibility in their registration choices. It ensures that the Credit Book feature is introduced smoothly, starting with the core functionality and expanding its capabilities over time.

Person 1

Person 2

Date

5.3.1. No add-on selected

1. Registration Type > 2. Golfer Information > 3. Additional Purchases > 4. Payment

Your Registrations Exit

9 Hole Entry Fee

	Additional Quantity	Price per Unit	Total
Boxed Lunch	0	\$15.00	\$0.00
Total			\$0.00

Next

Fig. 5.3.1. Add-ons - Showcase not adding an add-on for the current registration

1. Registration Type > 2. Golfer Information > 3. Additional Purchases > 4. Payment

Your Registrations Exit

9 Hole Entry Fee

Current Credit Balance: \$0.00

Use Credit Book
(Remaining balance after applying credit: \$0.00)

Do not use Credit Book

Summary for: Benavides, Robert

Description	Total Amount
9 Hole Entry Fee (\$100.00, 1 Member)	\$100.00
Total Amount	\$100.00

Step 1: Billing Details

First Name (Required)
Robert

Last Name (Required)
Benavides

Country (Required) ⓘ
Please select a country

City (Required)
[empty field]

Street Address Line 1 (Required)
[empty field]

Street Address Line 2 (Optional)
[empty field]

Zip Code (Required)
[empty field]

Billing Email
kendixonjr91+bena@gmail.com

Cancel Skip Payment ⓘ Next

Person 1

Person 2

Date

Fig. 5.3.2. Add-ons - No add-on added to the registration, showcase the fact that you can pay using the credit book

5.3.2. Add-ons selected

If the Additional Quantity is not 0, Credit Book will not be available for that registration

1. Registration Type |> 2. Golfer Information |> 3. Additional Purchases |> 4. Payment

Your Registrations | Exit

9 Hole Entry Fee

	Additional Quantity	Price per Unit	Total
Boxed Lunch	2	\$15.00	\$30.00
Total			\$30.00

Next

Fig. 5.3.3. Add-ons - Showcase adding an add-on for the current registration

1. Registration Type |> 2. Golfer Information |> 3. Additional Purchases |> 4. Payment

Your Registrations | Exit

9 Hole Entry Fee

Registration Fee

Summary for: Benavides, Robert	
Description	Total Amount
Boxed Lunch (2 Additional x \$15.00)	\$30.00
9 Hole Entry Fee (\$100.00, 1 Member)	\$100.00
Total Amount	\$130.00

Step 1: Billing Details

First Name (Required) Robert	Street Address Line 1 (Required)
Last Name (Required) Benavides	Street Address Line 2 (Optional)
Country (Required) ⓘ Please select a country	Zip Code (Required)
City (Required)	Billing Email kendixonjr91+bena@gmail.com

Cancel | **Skip Payment ⓘ** | **Next**

Person 1
Person 2

Date

Fig. 5.3.4. Add-ons - No add-on added to the registration, showcase the fact that you can't pay using the credit book, only using the credit card

More details will be provided in the [Future Work](#)

5.4. Split Payments

In scenarios where you are organizing a team league or event using the Event/League Registration with Payment feature, you may find it beneficial to allow for split payments among the team players. This Team Split Payment feature offers flexibility in handling registration fees for teams.

When utilizing Team Split Payments, the primary registrant, often the team captain or manager, is empowered with several options for managing the payment structure:

5.4.1. Pay for the Entire Team

The primary registrant can choose to cover the registration fees for the entire team, simplifying the payment process and ensuring that all team members are registered with a single payment.

5.4.2. Pay for a Portion of the Team

Alternatively, the primary registrant has the option to pay for a specified portion of the team's registration fees. This is especially useful when team members decide to split the costs among themselves, allowing each member to contribute their share individually.

5.4.3. Split Registration Across Team Players

In situations where each team member is responsible for their own registration fees, the primary registrant can select the "Split Registration" option. This choice enables team members to individually cover their own registration expenses during the registration process.

1. A manager can select the option that a registrant can choose to split payments across players. If selected, players will receive an individualized payment link via e-mail.

Person 1
Person 2

Date

Fig. 5.4.1. Split Payments - Split Across Team Players - Pricing option checked: Registrant can choose to split payments across players.

2. When the golfer is registering, he will have the option to add another member

Person 1
Person 2

Date

The screenshot shows the '2. Golfer Information' step of a registration process. A member named 'Tyler Sayre (Member)' is selected. The 'Required - Complete' status is shown next to the member's name. Below the member's details, there are fields for Email (tylersayre@test.com), First name (Tyler), and Last name (Sayre). There are also fields for GHIN and Handicap Index (7.8). A red box highlights the 'Add Another Member to My Team' button. Below the button, two checkboxes are visible: one for acknowledging terms and conditions, and another for confirming consent from multiple individuals.

1. Registration Type | 2. Golfer Information | 3. Payment

Your Registrations | Exit

demo 1

▲ Tyler Sayre (Member) Required - Complete Hide Player Details

Please Select Member
Tyler Sayre x v

* Denotes required fields

Email First name * Last name *

tylersayre@test.com Tyler Sayre

GHIN Handicap Index

7.8

Add Another Member to My Team

I acknowledge that Golf Genius Software will save and process the information provided here, subject to the Golf Genius [Terms of Service](#) and [Privacy Policy](#)

I confirm that I have consent from all of the above individuals to provide information above on their behalf, subject to the Golf Genius Software [Terms of Service](#) and [Privacy Policy](#)

Fig. 5.4.2. Split Payments - Split Across Team Players - Add Another Member in My Team action

3. Two members in one team

The screenshot shows the '2. Golfer Information' step of a registration process. Two members are listed: 'Tyler Sayre (Member)' and 'Tony Teal (Member)'. The 'Required - Complete' status is shown next to Tyler Sayre, while Tony Teal is marked as 'Optional - Complete'. Below the member lists, the same two checkboxes for terms and conditions are present. At the bottom right, a 'Next' button is visible.

1. Registration Type | 2. Golfer Information | 3. Payment

Your Registrations | Exit

demo 1

▼ Tyler Sayre (Member) Required - Complete Show Player Details

▼ Tony Teal (Member) Optional - Complete Show Player Details

I acknowledge that Golf Genius Software will save and process the information provided here, subject to the Golf Genius [Terms of Service](#) and [Privacy Policy](#)

I confirm that I have consent from all of the above individuals to provide information above on their behalf, subject to the Golf Genius Software [Terms of Service](#) and [Privacy Policy](#)

Next

Person 1

Person 2

Date

Fig. 5.4.3. Split Payments - Split Across Team Players - Showcase the two members in one team

4. The golfer that is registering another member has the possibility to pay for his registration fee, or send him an email with the payment link. The email will look similar to the email reminder section

The screenshot shows a software interface for managing registrations. At the top, there are three tabs: '1. Registration Type', '2. Golfer Information', and '3. Payment'. The '3. Payment' tab is active. In the center, there's a table for 'Invoice Player' with one row for 'Teal, Tony' with handle 'tony@test.com' and amount due '\$25.00'. To the right of the table, there are two radio button options: 'Pay registration for Teal, Tony now' (unchecked) and 'Send payment link via e-mail' (checked). A red box highlights the checked radio button. Below the table, there's a section titled 'Your Invoice:' with a table showing a single entry: 'Open Registration Fee for Sayre, Tyler' with amount '\$25.00'. The total amount is listed as '\$25.00'. At the bottom right, there's a 'Next' button.

Fig. 5.4.4. Split Payments - Split Across Team Players - Invoice Players: Send payment link via email

5. Current Credit Balance: \$100.00

The screenshot shows a software interface for managing registrations. At the top, there are three tabs: '1. Registration Type', '2. Golfer Information', and '3. Payment'. The '3. Payment' tab is active. In the center, there's a section titled 'Registration Fee' with a note 'Current Credit Balance: \$100.00'. Below this, there are two radio button options: 'Use Credit Book' (checked) and 'Do not use Credit Book'. A red box highlights the checked radio button. Below the radio buttons, there's a section titled 'Summary for: Tyler Sayre' with a table showing a single entry: 'Open Registration Fee for Tyler Sayre' with amount '\$25.00'. The total amount is listed as '\$25.00'. At the bottom right, there's a 'HELP' button.

Person 1
Person 2

Date

Fig. 5.4.5. Split Payments - Split Across Team Players - Showcase paying the registration fee using Credit Book

6. Click on Pay registration for Foster, Ashley

The screenshot shows a software interface for managing registrations. At the top, there are three tabs: '1. Registration Type', '2. Golfer Information', and '3. Payment'. The '3. Payment' tab is active. In the center, there's a table with columns 'Handle', 'Email', 'Amount Due', and 'Invoice Player'. A row for 'Foster, Ashley' is selected, showing 'ashley@test.com' and '\$25.00'. To the right of the table are two buttons: 'Pay registration for Foster, Ashley now' (which is highlighted with a red box) and 'Send payment link via e-mail'. Below the table, there's a section titled 'Your Invoice:' with a table showing 'Description' and 'Amount'. It lists 'Open Registration Fee for Vasiluta, Andrei' and 'Open Registration Fee for Foster, Ashley', both with '\$25.00' amounts. A total amount of '\$50.00' is shown at the bottom. At the bottom right of the main area is an orange 'Next' button. On the far right edge of the window, there's a vertical 'HELP' button.

Fig. 5.4.6. Split Payments - Split Across Team Players - Invoice Player: pay registration for everyone will pay the registration fee for all the members of the team

7. Total amount to be paid is 0

The screenshot shows a software interface for managing payments. At the top, it says 'Registration Fee' and 'Current Credit Balance: \$100.00'. Below that, there are two radio button options: 'Use Credit Book' (selected, with a note '(Remaining balance after applying credit: \$50.00)') and 'Do not use Credit Book'. Further down, there's a section titled 'Summary for Andrei Vasiluta' with a table showing 'Description' and 'Amount'. The table includes rows for 'Open Registration Fee for Andrei Vasiluta' (\$25.00), 'Open Registration Fee for Tiger Mickelson' (\$25.00), 'Credit Applied (\$50.00)' (-\$50.00), and 'Total amount' (\$0.00). A red box highlights this summary table. On the far right edge of the window, there's a vertical 'HELP' button.

Fig. 5.4.7. Split Payments - Split Across Team Players - Showcase the credits applied and the total amount to be paid

Person 1

Person 2

Date

5.5. Membership Programs

Golf associations often extend membership programs to their members as a valuable component of their offerings.

Master Roster Registration and Membership Programs: Once players have successfully registered on the Master Roster, they are provided with the opportunity to further enhance their golfing experience by enrolling in one or more membership programs offered by the association. This integration streamlines the registration process, making it efficient and convenient for members.

Benefits of Membership Programs:

Participation in these membership programs brings a range of benefits, including:

Eligibility for Selected Events: Members who join these programs gain access to a wider array of golfing events and tournaments. These programs often grant exclusive eligibility to participate in specific events, fostering a sense of belonging and camaraderie among members.

Discounted Entry Fees: One of the key advantages of membership programs is the opportunity for members to enjoy discounted entry fees when registering for tournaments and competitions. This cost-saving benefit makes golfing more accessible and affordable for members.

Early Registration: Membership programs frequently offer the privilege of early registration. This means that members have the opportunity to secure their spots in tournaments and events ahead of non-members. Early registration ensures that members can participate in their preferred events without the risk of events reaching capacity.

Membership programs will have the same behavior as the [User Payment Flows](#).

1. Log in as a golfer

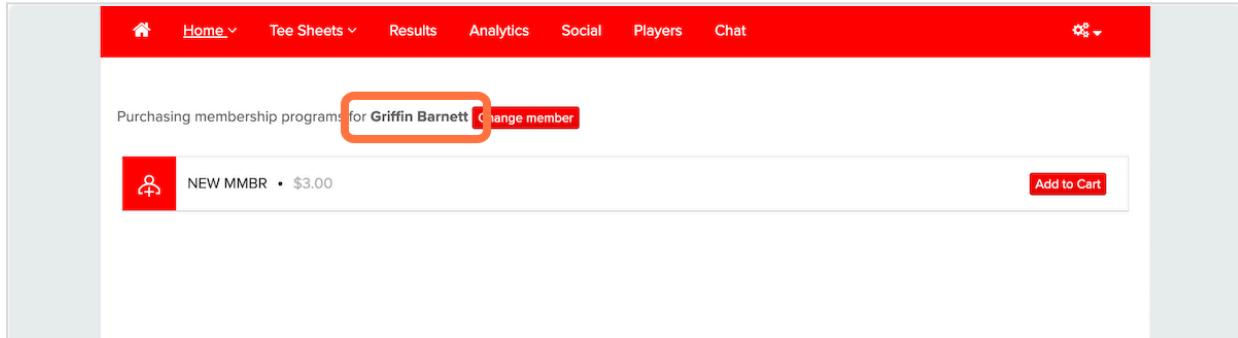


Fig. 5.5.1. Membership Programs - target golfer

2. Add to Cart the membership

Person 1
Person 2

Date

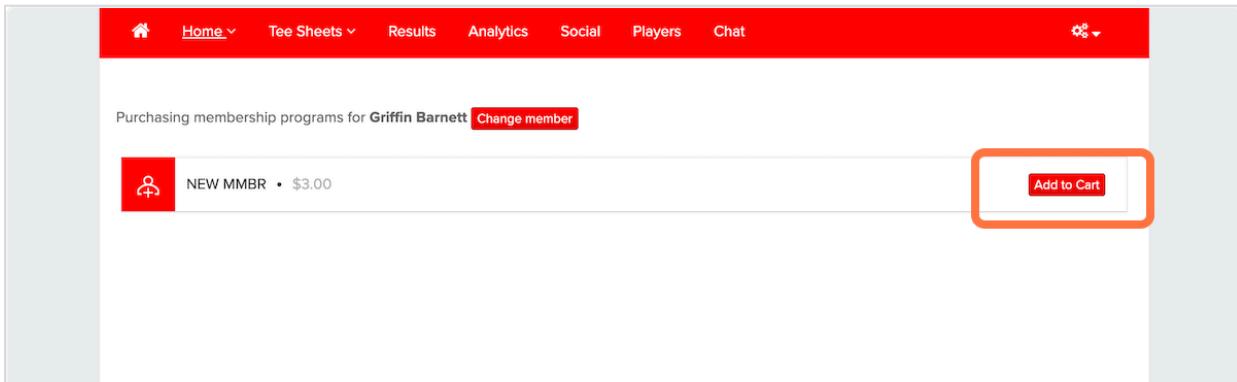


Fig. 5.5.2. Membership Programs - add to cart action

3. Checkout Membership Program

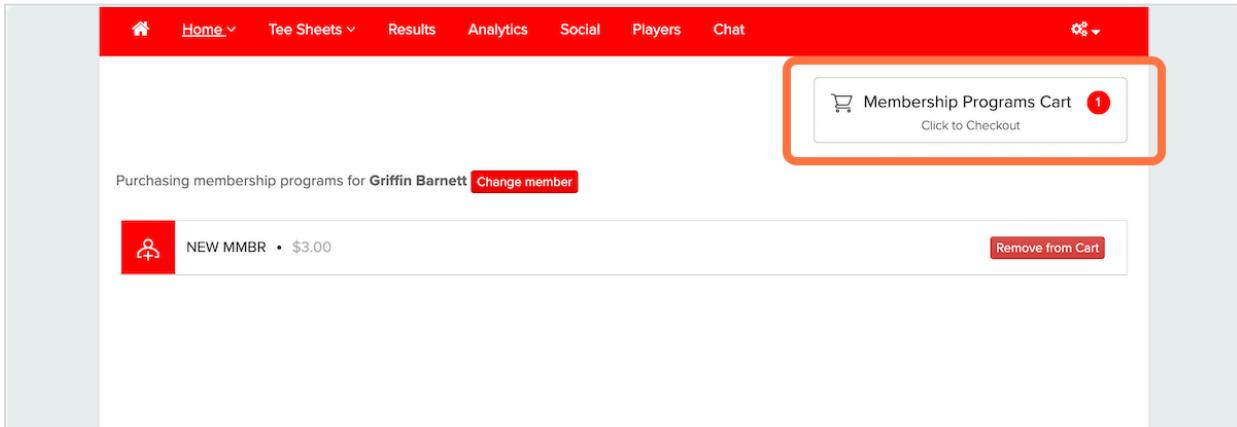


Fig. 5.5.3. Membership Programs - membership program card checkout actions

4. Use Credit Book or Credit Card

Person 1
Person 2

Date

Current Credit Balance: \$15.00

Use Credit Book
(Remaining balance after applying credit: \$12.00)

Do not use Credit Book

Summary for: Griffin Barnett	
Description	Total Amount
NEW MMBR	\$3.00
Credit Applied (\$3.00)	-\$3.00
Total Amount	\$0.00

Cancel Register

Fig. 5.5.4. Membership Programs - Showcase paying the fee using Credit Book

5. See the membership program cost and the credit applied

Current Credit Balance: \$15.00

Use Credit Book
(Remaining balance after applying credit: \$12.00)

Do not use Credit Book

Description	Total Amount
NEW MMBR	\$3.00
Credit Applied (\$3.00)	-\$3.00
Total Amount	\$0.00

Cancel Register

Fig. 5.5.5. Membership Programs - Showcase the credits applied and the total amount to be paid

Person 1

Person 2

Date

5.6. Send Payment Reminder

The Payment Reminder emails include a convenient link that directs users to the payment page. It's important to note that the Credit Book functionality is seamlessly integrated into the payment process on this page. Therefore, users can utilize their Credit Book without requiring any additional adjustments when accessing payment through the reminder emails.

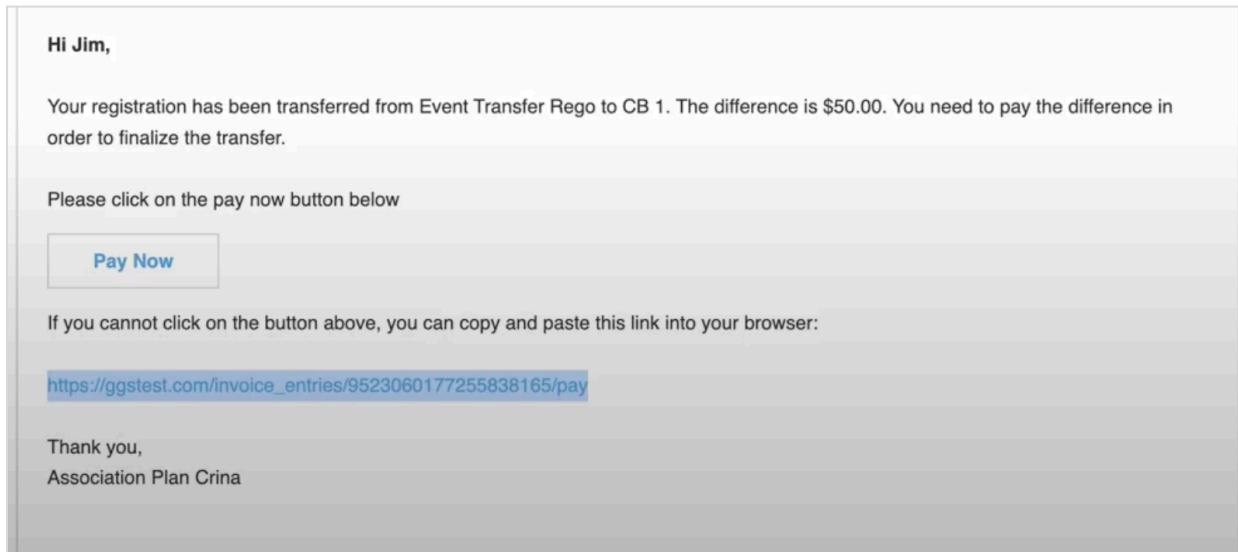


Fig. 5.6.1. Send Payment Reminder - Showcase the email with the payment link

The image shows a payment interface with an orange header bar containing navigation links like Home, Tee Sheets, Results, Analytics, Social, and a settings icon. The main content area has a title "Payment - CB 1" and a note about a current credit balance of \$160.00. A red box highlights the "Use Credit Book" option, which shows a remaining balance of \$110.00 after applying the credit. Another red box highlights the "Do not use Credit Book" option. Below this, a "Summary for: Jim Nickolaus" section shows a table with columns for Description and Amount. The table includes rows for an open registration fee (\$50.00), a credit applied (\$50.00), and a total amount of \$0.00.

Description	Amount
Open Registration Fee for CB 1 event	\$50.00
Credit Applied (\$50.00)	-\$50.00
Total Amount	\$0.00

Fig. 5.6.2. Send Payment Reminder - Showcase the payment page with the possibility to pay with the Credit Book balance and the details of payment

Person 1
Person 2

Date

5.7. Multi-Event Registration

Upon enabling multi-event registration, players gain the flexibility to explore directories and portals to add registrations to their cart conveniently. The registration cart button is thoughtfully accessible across all portal pages and directories, ensuring a streamlined registration experience.

5.7.1. Registration

When registering for multiple events, players have the option to make a single payment for all their selected registrations. They can choose whether to utilize their Credit Book (CB) balance to cover the registration cost or opt for alternative payment methods.

5.7.2. Refund

The same refund rules apply for both Credit Book (CB) and Credit Card (CC) payments, and these rules are implemented on an event-by-event basis. If a player requests a refund, it will be processed following the specific refund policy associated with each event. The choice of payment method (CB or CC) for the original registration does not affect the refund process; the applicable refund rules will be consistently applied.

1. Click on Directory of Leagues and Events

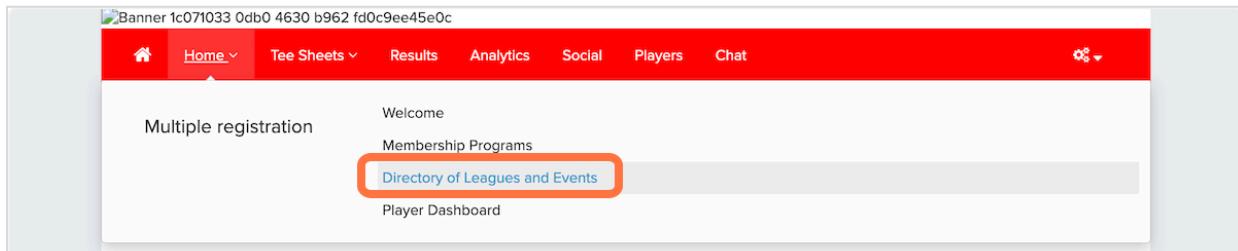


Fig. 5.7.1. Multi-Event Registration - Directory of Leagues and events action

2. Click on Add to Cart

Person 1
Person 2

Date

The screenshot shows the software's main interface for managing leagues and events. At the top, there is a navigation bar with links for Home, Tee Sheets, Results, Analytics, Social, Players, and Chat. A registration cart icon in the top right corner shows a count of 1. Below the navigation, a search bar contains the term "multip". A tooltip above the search bar explains that it allows searching for specific events or course names. The main content area displays a list of events under the heading "ALL LEAGUES & EVENTS". Two specific sections are highlighted with a red box: "MULTIPLE REGISTRATION" and "MULTIPLE TRANSACTIONS", both of which are labeled as "OPEN". Each section has a "Checkout • Register Now" button and a note indicating "Multiple Courses". A "Clear Filters" button is located to the right of the search bar. On the far right, there is a vertical "HELP" button.

Fig. 5.7.2. Multi-Event Registration - Add to cart action

3. Click on Registration Cart

This screenshot shows the same software interface as Fig. 5.7.2, but with a red box highlighting the "Registration Cart" icon in the top right corner. The icon indicates a count of 2. The rest of the interface is identical to the previous figure, showing the search results for "multip" and the two highlighted sections under "MULTIPLE REGISTRATION" and "MULTIPLE TRANSACTIONS".

Fig. 5.7.3. Multi-Event Registration - checkout actions

Person 1
Person 2

Date

4. Registration cart options page

The screenshot shows a registration cart interface. At the top, there's a navigation bar with links like 'Back to Directory', 'Home', 'Tee Sheets', 'Results', 'Analytics', 'Social', 'Players', and 'Chat'. Below the navigation is a section titled 'REGISTRATION CART' with a sub-section header 'Events'. A note says: 'Please review the events in your registration cart. You will be able to configure your registration for each event individually once you click "Continue" below. You will enter your credit card details only once at the end of the registration process.' Below this, there's a table with two rows:

Name	Date(s)	Golfers ⓘ	Registration Options
Multiple transactions		0	<ul style="list-style-type: none">Pay: \$5.00 for the entire registration
Multiple registration		0	<ul style="list-style-type: none">Pay2: \$10.00 for the entire registration

At the bottom right of the cart area is a red 'Continue' button.

Fig. 5.7.4. Multi-Event Registration - Showcase the cart options

5. Use Credit book or pay with the Credit Card

The screenshot shows a 'Registration Fees' page. It starts with a note 'Please donate' and a section 'Please select donation amount' with radio buttons for '\$0.00', '\$5.00', '\$10.00', '\$25.00', '\$50.00', '\$100.00', and 'Other'. Below this, it shows 'Current Credit Balance: \$20.00'. There are two options for using a credit book:

- Use Credit Book
(Remaining balance after applying credit: \$15.00)
- Do not use Credit Book

At the bottom, there's a summary table for 'Aarav Lavu':

Description	Total Amount
Multiple transactions - Pay (\$5.00, 1 Member)	\$5.00
Multiple registration - Pay2 (\$10.00, 1 Member)	\$10.00
Total Amount	\$0.00

Fig. 5.7.5. Multi-Event Registration - Showcase the use of credit book balance for this transaction

Person 1
Person 2

Date

5.8. Multi-Stage Event Promotions

In the context of Multi-Stage Event Promotions, a unique scenario arises when a player chooses to fully pay for the first stage of an event using their Credit Book (CB). Subsequently, if there is a charge for promotion in the later stages, it's important to note that the player may not have provided Credit Card (CC) data during their initial registration since they used their CB for payment.

5.8.1. Flow 1: Payment with CB, New CC Added

1. The golfer pays the fee for the First Stage using their Credit Book (CB).
2. When the manager promotes the golfer to the next stage, it's discovered that the golfer's CB balance is depleted, and no Credit Card (CC) is available for the promotion.
3. In response, the manager adds new payment details, specifically a new credit card.
4. The manager will then be able to make the payment for the next stage using the newly added credit card and advance the golfer to the next stage.

5.8.2. Flow 2: Payment with CC, New CC Added

1. In this scenario, the golfer pays the fee for the First Stage using a Credit Card (CC).
2. During the promotion to the next stage, an issue arises with the CC payment. This may be due to a payment failure, an expired CC, or the absence of an available CC.
3. To resolve this, the manager adds new payment details, introducing a new credit card into the system.
4. The manager will then be able to make the payment for the next stage using the newly added credit card and advance the golfer to the next stage.

5.8.3. Flow 3: Payment with CC, Switch to CB

1. The golfer pays the fee for the First Stage using a Credit Card (CC).
2. Subsequently, the golfer's CB balance increases, either through a manual adjustment or a previous refund.
3. In this case, the golfer opts to pay for the next stage using their enhanced Credit Book (CB) balance, facilitating their advancement to the next stage.

Person 1
Person 2

Date

5.8.4. Flow 4: Payment with CC, Mixed Payment, and New CC Added

1. Initially, the golfer pays the fee for the First Stage with a Credit Card (CC).
2. Later, the golfer's CB balance increases, but it's not sufficient to cover the entire fee for the next stage.
3. To proceed, the golfer engages in a mixed payment, utilizing their available CB balance to pay a portion of the fee and providing CC details for the remaining amount.
 - a. In the event of a payment issue on the CC or the absence of an available CC, the manager intervenes by adding new payment details, typically a new credit card.
4. The manager will then be able to make the payment for the next stage using the newly added credit card and advance the golfer to the next stage.

5.8.5. Flow 5: Payment with CB, Continued Payment with CB

1. In this flow, the golfer makes the initial payment for the First Stage using their Credit Book (CB).
2. Subsequently, the golfer's CB balance increases, either through a manual adjustment or a previous refund, and it's now sufficient to cover the entire fee for the next stage.
3. The golfer opts to pay for the next stage entirely using their Credit Book (CB) balance, facilitating a seamless progression to the next stage.
4. These flows encompass a variety of scenarios and payment methods within the Multi-Stage Event Promotions context, ensuring flexibility and adaptability for golfers as they advance through different stages of their event participation.

Person 1

Person 2

Date

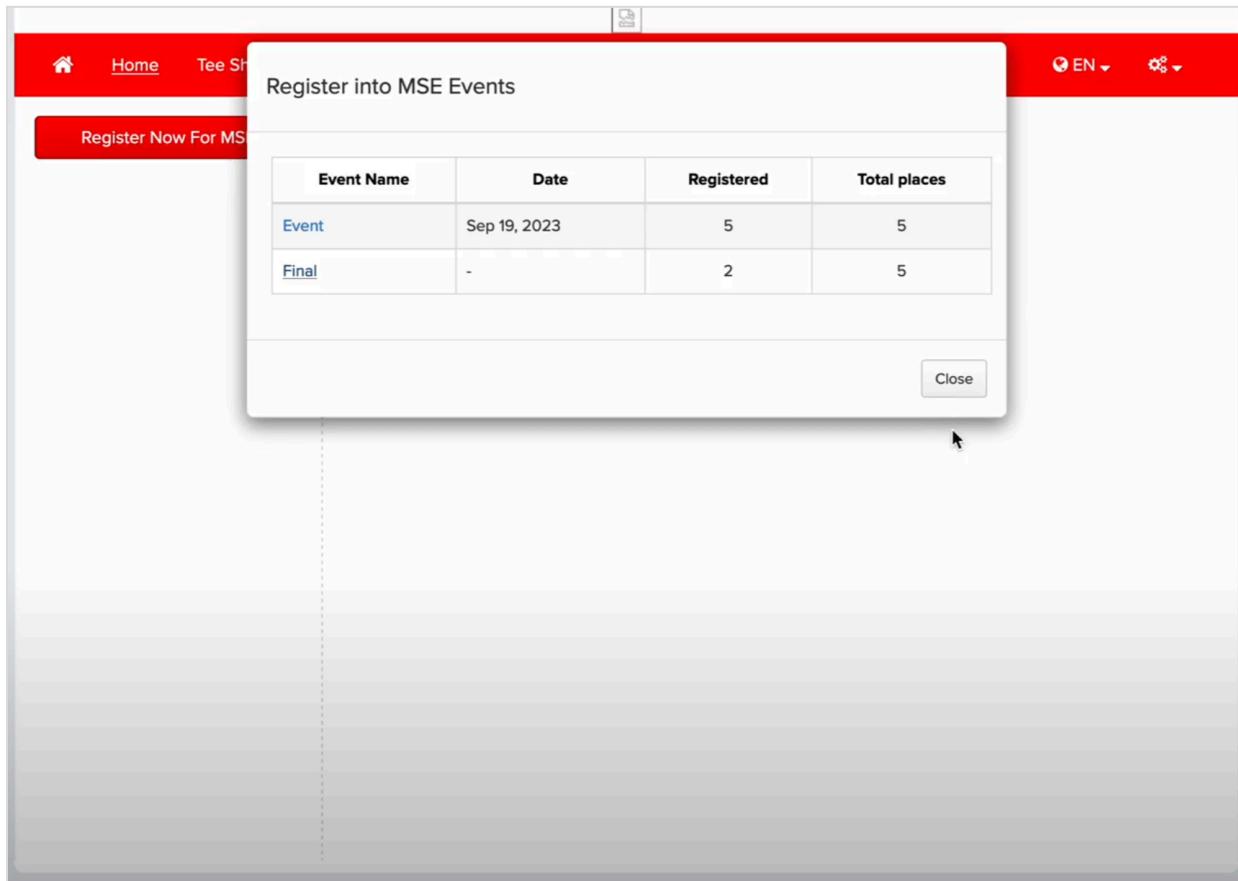


Fig. 5.8.1. Registering into MSE Events

Person 1
Person 2

Date

Registration Fee

Please donate

Please select donation amount

No donation \$5.00 \$10.00 \$25.00 \$50.00 \$100.00 Other

Current Credit Balance: \$15.00

Use Credit Book
(Remaining balance after applying credit: \$0.00)

Do not use Credit Book

Summary for: Benjamin Al-Khaffaf

Description	Total Amount
Final (\$15.00, 1 Member)	\$15.00
Credit Applied (\$15.00)	-\$15.00
Total Amount	\$0.00

Cancel **Register**

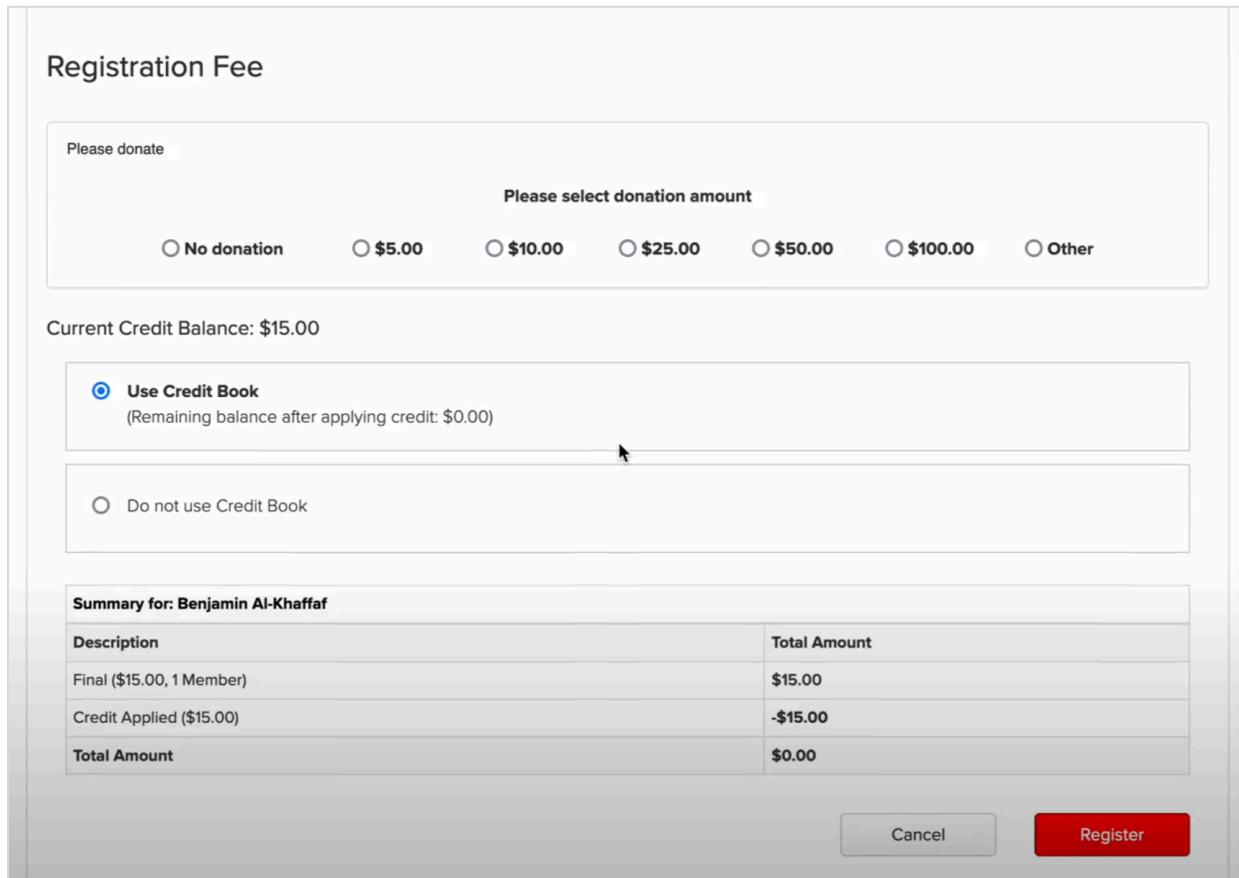


Fig. 5.8.2. If there is enough Credit Book balance available for the promotion charge to be made, there will be no need for Credit Card data.

5.9. Pending Registrations

In the context of event and league registrations, there are situations where managers may require approval for player registrations before including them on the event roster. Once players and teams submit their registrations for approval, they enter a 'pending' status, awaiting the manager's decision to either approve or reject their registration.

These flows will present the "Pending Registration" within Event and League Registration, allowing for various payment methods and scenarios while ensuring that the registration process remains flexible and user-friendly for golfers and managers alike.

5.9.1. Flow 1: Pending Registration with CB, New CC Added

Person 1
Person 2

Date

1. A golfer initiates registration for the event and chooses to pay using their Credit Book (CB).
2. After submitting their registration for approval, it is pending manager approval.
3. The manager reviews the pending registration but notices that the golfer's CB balance is depleted, and there's no available Credit Card (CC) for payment upon approval.
4. To facilitate the registration, the manager adds new payment details, specifically a new credit card.
5. The manager will then be able to make the payment using the newly added credit card and move forward with the event.

5.9.2. Flow 2: Pending Registration with CC, New CC Added

1. In this scenario, a golfer initiates registration for the event and opts to pay using a Credit Card (CC).
2. Their registration is submitted for approval and is in a pending status.
3. During the manager's review, it's discovered that there's an issue with the CC payment (e.g., payment failure, expired CC, or no available CC).
4. The manager proceeds by adding new payment details, introducing a new credit card for the golfer's registration.
5. The manager will then be able to make the payment using the newly added credit card and move forward with the event.

5.9.3. Flow 3: Pending Registration with CC, Switch to CB

1. A golfer initiates registration for the event and pays using a Credit Card (CC).
2. Their registration is submitted for approval and placed in a pending status.
3. Subsequently, the golfer's CB balance increases, either through a manual adjustment or a previous refund, while the registration remains pending.
4. In this scenario, the golfer chooses to switch their payment method to Credit Book (CB) for the next stage, making use of their enhanced CB balance.
5. Upon manager approval, the golfer can proceed with the payment processed from their CB balance.

5.9.4. Flow 4: Pending Registration with CC, Mixed Payment, and New CC Added

1. Initially, a golfer registers for the event and pays using a Credit Card (CC).
2. Their registration enters a pending status awaiting manager approval.

Person 1
Person 2

Date

3. As the golfer's CB balance increases later, it's found to be insufficient to cover the entire fee for the event.
4. To proceed, the golfer chooses a mixed payment approach, applying their available CB balance toward a portion of the fee and providing CC details for the remaining amount while the registration is still pending.
5. In the event of a payment issue on the CC or the absence of an available CC, the manager intervenes by adding new payment details, usually a new credit card.
6. The manager will then be able to make the payment using the newly added credit card and move forward with the event.

5.9.5. Flow 5: Pending Registration with CB, Continued Payment with CB

1. In this flow, a golfer initiates registration for the event and makes the payment using their Credit Book (CB).
2. Their registration enters a pending status as it awaits manager approval.
3. Upon manager approval, the credits will be subtracted from the golfer's Credit Book balance.

5.10. Manage Waitlist Promotions and Auto-Waitlist Promotions

5.10.1. Flow 1: Waitlist Management with CB, New CC Added

1. A golfer registers for the event and chooses to pay using their Credit Book (CB).
2. As the registered player limit is reached, the golfer's registration enters a waitlist status, awaiting confirmation.
3. Later, when a spot becomes available, the manager reviews the waitlisted registration but notices that the golfer's CB balance is depleted, and there's no available Credit Card (CC) for payment upon confirmation.
4. To facilitate the confirmation, the manager adds new payment details, specifically a new credit card.
5. The manager will then be able to make the payment using the newly added credit card and move forward with the event.

5.10.2. Flow 2: Waitlist Management with CC, New CC Added

1. In this scenario, a golfer registers for the event and opts to pay using a Credit Card (CC).

Person 1
Person 2

Date

2. However, as the registered player limit is reached, their registration enters a waitlist status, pending confirmation.
3. During the manager's review, it's discovered that there's an issue with the CC payment (e.g., payment failure, expired CC, or no available CC).
4. To resolve this, the manager adds new payment details, introducing a new credit card for the golfer's registration.
5. The manager will then be able to make the payment using the newly added credit card and move forward with the event.

5.10.3. Flow 3: Waitlist Management with CC, Switch to CB

1. A golfer registers for the event and pays using a Credit Card (CC).
2. Due to reaching the registered player limit, their registration enters a waitlist status, pending confirmation.
3. Subsequently, the golfer's CB balance increases, either through a manual adjustment or a previous refund, while the registration remains on the waitlist.
4. In this scenario, the golfer chooses to switch their payment method to Credit Book (CB) upon confirmation, making use of their enhanced CB balance.
5. Upon manager confirmation, the golfer can proceed with the payment processed from their CB balance and move forward in the event.

5.10.4. Flow 4: Waitlist Management with CC, Mixed Payment, and New CC Added

1. Initially, a golfer registers for the event and pays with a Credit Card (CC).
2. However, due to reaching the registered player limit, their registration is placed on the waitlist.
3. As the golfer's CB balance increases later, it's found to be insufficient to cover the entire fee upon confirmation.
4. To proceed, the golfer chooses a mixed payment approach, using their available CB balance for a portion of the fee and providing CC details for the remaining amount while the registration is still on the waitlist.
5. In the event of a payment issue on the CC or the absence of an available CC, the manager intervenes by adding new payment details, typically a new credit card.
6. The manager will then be able to make the payment using the newly added credit card and move forward with the event.

Person 1

Person 2

Date

5.10.5. Flow 5: Waitlist Management with CB, Continued Payment with CB

1. In this flow, a golfer registers for the event and makes the initial payment using their Credit Book (CB).
2. However, as the registered player limit is reached, their registration enters a waitlist status while awaiting confirmation.
3. Their registration enters a pending status as it awaits manager approval.
4. Upon manager approval, the credits will be subtracted from the golfer's Credit Book balance.

Auto-waitlist promotions will have the same effect as a manual promotion, but it will be executed automatically.

Team Id :	Entry # :	Handle :	Flight :	H.I. :	Email :	Amo
<input checked="" type="checkbox"/> 44	206	Hutton, Mark	Palmer (4.0 - 7.9)	7.2	mhatt787@gmail.com	\$45
<input checked="" type="checkbox"/> 49	211	Brautigam, Richard	Senior Snead (20+)	33.1	richard_brautigam@avalonbay.com	\$45
<input type="checkbox"/> 74	236	Soto Campa, Gabriel	Jones (16.0 - 19.9)	19.6	gscampa@hotmail.com	\$45
<input type="checkbox"/> 77	239	Schaefer, Mark	Palmer (4.0 - 7.9)	5.8	markaschaefer@outlook.com	\$45
<input type="checkbox"/> 83	245	Weichselbaumer, Eric	Palmer (4.0 - 7.9)	8.4	ericweichselbaumer@gmail.com	\$45

Fig. 5.10.1. Manage waitlist page

Person 1
Person 2

Date

The screenshot shows a software interface for managing golfers. At the top, there are tabs for 'AM TOUR', 'Monterey Amateur Champions...', 'Dashboard', 'Golfers', and 'Manager'. Below the tabs, a sidebar on the left has buttons for 'Waitlist' (highlighted in orange), 'Confirmed', 'Select All', 'Unselect All', 'Shuffle', and 'Clear Shuffle'. In the center, there's a search bar with placeholder text 'Search...'. Below the search bar, a message says 'Move selected golfers to' followed by a dropdown menu with options 'Confirmed and charge' (selected and highlighted with an orange border) and 'Unconfirmed'. To the right of the dropdown is a 'Go' button. A dashed box highlights the 'Confirmed and charge' option. At the bottom, a table lists golfers with columns for 'Team Id', 'Entry #', 'Handle', and 'Flight'. Two rows are selected, indicated by orange checkmarks in the 'Team Id' column. The first row is for Hutton, Mark (Team Id 44) and the second for Brautigam, Richard (Team Id 49).

Team Id	Entry #	Handle	Flight
<input checked="" type="checkbox"/> 44	206	Hutton, Mark	Palmer (4.0 - 7.9)
<input checked="" type="checkbox"/> 49	211	Brautigam, Richard	Senior Snead (20+)

Fig. 5.10.2. A manager can select the golfers and move them to the confirmed tab charging the default payment method

5.11. PGA Financial API

Link to the previous PGA of America documentation in Appendix: [link](#).

Features requiring PGA Financial API call:

5.11.1. Payments

5.11.1.1. Credit Card only

Nothing changed here

5.11.1.2. Credit Book only

After submitting a payment through the registration form, an API call is made to the PGA, the payment method used is the Transfer one.

Number of invoices: 1

Person 1
Person 2

Date

Payment method: Transfer

Amount: full amount of the invoice

```
{:invoice_id=>"9473754292167915960",
:invoice_url=>

"http://golfgenius.com/customers/16313/transaction_logs?invoice_entry_id=9
473754292167915960",
:total=>"100.00",
:subtotal=>"100.00",
:tax=>"0.00",
:date=>"2023-04-24",
:payments=>
[{:typeId=>"95c7601c-870e-4b9e-9c16-294cac394a28",
:transactionNumber=>"ce_277",
:amount=>"100.00"}],
:products=>
[{:id=>"2022PGA-CPGA-01-TIC-FEE",
:quantity=>1,
:price=>"100.00",
:total=>"100.00",
:unit_price=>"100.00",
:subtotal=>"100.00",
:tax=>"0.00",
:product=>
{:name=>"18 PGA REACH Development", :event=>{:name=>"Credit Book
Demo"}}]]}
```

5.11.1.3. Credit Card + Credit Book (Mixed)

After submitting a payment through the registration form, an API call is made to the PGA, there are two payment methods used: one for the Credit Card and one for the Credit Book.

Invoice total: \$100

Number of invoices: 1

Payment method:

- Default for the Credit Card payment amount
- Transfer for the Credit Book payment amount

Amount:

- \$51 Credit Card
- \$49 Credit Book

```
{:invoice_id=>"9473758979218749881",
```

Person 1
Person 2

Date

```
:invoice_url=>

"http://golfgenius.com/customers/16313/transaction_logs?invoice_entry_id=9
473758979218749881",
:total=>"100.00",
:subtotal=>"100.00",
:tax=>"0.00",
:date=>"2023-04-24",
:payments=>
[{:typeId=>"95c7601c-870e-4b9e-9c16-294cac394a28",
:transactionNumber=>"ce_279",
:amount=>"49.00"},

{:typeId=>"595e690a-5f24-42ab-ad3c-c97ccd0e937b",
:transactionNumber=>"pi_3N0Oh4Hfc0X6QhpF0ZwkIfHb",
:amount=>"51.00"}],
:products=>
[{:id=>"2022PGA-CPGA-01-TIC-FEE",
:quantity=>1,
:price=>"100.00",
:total=>"100.00",
:unit_price=>"100.00",
:subtotal=>"100.00",
:tax=>"0.00",
:product=>
{:name=>"2022PGA-CPGA-01-TIC-FEE", :event=>{:name=>"Credit Book
Demo"}} } ] }
```

5.11.2. Refunds

5.11.2.1. Credit Card

Invoice total: \$-100

Number of invoices: 1

Payment method:

- Default for the Credit Card payment amount

Amount:

- \$-100 Credit Card

```
{:invoice_id=>"9473777207563270587_refund_re_3N0OppHfc0X6QhpF0feGc3Zu",
:invoice_url=>
```

Person 1
Person 2

Date

```
"http://golfgenius.com/customers/16313/transaction_logs?invoice_entry_id=9473777207563270587",
:total=>"-100.00",
:subtotal=>"-100.00",
:tax=>"0.00",
:date=>"2023-04-24",
:payments=>[],
:payment_type_id=>"595e690a-5f24-42ab-ad3c-c97ccd0e937b",
:products=>
[{:id=>"2022PGA-CPGA-01-TIC-FEE",
:quantity=>1,
:unit_price=>"-100.00",
:subtotal=>"-100.00",
:tax=>"0.00",
:total=>"-100.00"}],
:transaction_id=>"re_3N0OppHfc0X6QhpF0feGc3Zu"}
```

5.11.2.2. Credit Book

Invoice total: \$-100

Number of invoices: 1

Payment method:

- Default for the Transfer payment amount

Amount:

- \$-100

```
{:invoice_id=>"9473820296352905660_refund_re_3N0PAWHfc0X6QhpF02wPLXU8",
:invoice_url=>

"http://golfgenius.com/customers/16313/transaction_logs?invoice_entry_id=9473820296352905660",
:total=>"-100.00",
:subtotal=>"-100.00",
:tax=>"0.00",
:date=>"2023-04-24",
:payments=>[],
:payment_type_id=>"595e690a-5f24-42ab-ad3c-c97ccd0e937b",
:products=>
[{:id=>"2022PGA-CPGA-01-TIC-FEE",
:quantity=>1,
:unit_price=>"-100.00",
:subtotal=>"-100.00",
:tax=>"0.00",
:total=>"-100.00"}],
```

Person 1
Person 2

Date

```
:transaction_id=>"re_3N0PAWHfC0X6QhpF02wPLXU8"}
```

5.11.2.3. Credit Card + Credit Book (Mixed)

Invoice total: \$-100

Number of invoices: 1

Payment method:

- Default for the Credit Card payment amount
- Transfer for the Credit Book payment amount

Amount:

- \$-51 Credit Card
- \$-49 Credit Book

```
{ :invoice_id=>"9473758979218749881_refund_",
  :invoice_url=>
  "http://golfgenius.com/customers/16313/transaction_logs?invoice_entry_id=9
  473758979218749881",
  :total=>"-100.00",
  :subtotal=>"-100.00",
  :tax=>"0.00",
  :date=>"2023-04-24",
  :payments=>
  [ { :typeId=>"95c7601c-870e-4b9e-9c16-294cac394a28",
      :transactionNumber=>"ce_279",
      :amount=>"-49.00"}, #  

   { :typeId=>"595e690a-5f24-42ab-ad3c-c97ccd0e937b",
      :transactionNumber=>"pi_3N0Oh4Hfc0X6QhpF0ZwkIfHb",
      :amount=>"-51.00"} ],
  :products=>
  [ { :id=>"2022PGA-CPGA-01-TIC-FEE",
      :quantity=>1,
      :price=>"-100.00",
      :total=>"-100.00",
      :unit_price=>"-100.00",
      :subtotal=>"-100.00",
      :tax=>"0.00",
      :product=>
        { :name=>"18 PGA REACH Development", :event=>{ :name=>"Credit Book
        Demo" } } } ] }
```

5.11.3. Manual Adjustments

```
{ :invoice_id=>"ce_276_manual_adjustment",
```

Person 1
Person 2

Date

```
:invoice_url=>

"http://golfgenius.com/customers/16313/transaction_logs?invoice_entry_id=2
76",
:total=>"-153.00",
:subtotal=>"-153.00",
:tax=>"0.00",
:date=>"2023-04-24",
:payments=>[],
:payment_type_id=>"95c7601c-870e-4b9e-9c16-294cac394a28",
:transaction_id=>"ce_276",
:products=>
[{:id=>"2023-PGA_Champ-AXS-Food_Oak_Hill",
:quantity=>1,
:price=>"-153.00",
:total=>"-153.00",
:unit_price=>"-153.00",
:subtotal=>"-153.00",
:tax=>"0.00",
:product=>{ :name=>"18 PGA REACH Development", :event=>{ :name=>"" } } } ] }
```

5.11.4. Transfers

5.11.4.1. Source Event Amount = Target Event Amount

Even if the source event registration was a mixed-payment (\$60 CB, \$40 CC) the amount refunded will be combined as \$100 since both of these amount go to the same Payment Method - the Transfer Account.

Number of invoices: 2

Invoice 1 - Transfer Out

Invoice total: \$-100

Refund Payment method:

- Transfer for the Credit Book payment amount
- Transfer for the Credit Card payment amount

Amount:

- -\$60 Credit Book
- -\$40 Credit Card

```
{:invoice_id=>"9473849372744628672",
:invoice_url=>
```

Person 1
Person 2

Date

```
"http://golfgenius.com/customers/16313/transaction_logs?invoice_entry_id=9473849372744628672",
:total=>"-100.00",
:subtotal=>"-100.00",
:tax=>"0.00",
:date=>"2023-04-24",
:payments=>
[{:typeId=>"95c7601c-870e-4b9e-9c16-294cac394a28",
:transactionNumber=>"ie_9473849372744628672_ce_285",
:amount=>"-100.00"}],
:products=>
[{:id=>"2023-PGA_Champ-AXS-Food_Oak_Hill",
:quantity=>1,
:price=>"-100.00",
:total=>"-100.00",
:unit_price=>"-100.00",
:subtotal=>"-100.00",
:tax=>"0.00",
:product=>{:name=>"18 PGA REACH Development", :event=>{:name=>"CB Clone 100$"}}]]
```

There will be one invoice containing two separate payments, one for the CC and one for the CB, but both these payments will have the same Payment Method set. The reason for this is to separate the amounts

Invoice 2 - Transfer In

Invoice total: \$100

Payment method:

- Transfer for the Credit Book payment amount
- Transfer for the Credit Card payment amount

Amount:

- \$60 Credit Book
- \$40 Credit Card

```
{:invoice_id=>"9473849373650598337",
:invoice_url=>

"http://golfgenius.com/customers/16313/transaction_logs?invoice_entry_id=9473849373650598337",
:total=>"100.00",
:subtotal=>"100.00",
```

Person 1
Person 2

Date

```
:tax=>"0.00",
:date=>"2023-04-24",
:payments=>
[{:typeId=>"95c7601c-870e-4b9e-9c16-294cac394a28",
:transactionNumber=>"ie_9473849373650598337_ce_285",
:amount=>"100.00"}],
:products=>
[{:id=>"2023-PGA_Champ-AXS-Food_Oak_Hill",
:quantity=>1,
:price=>"100.00",
:total=>"100.00",
:unit_price=>"100.00",
:subtotal=>"100.00",
:tax=>"0.00",
:product=>{:name=>"18 PGA REACH Development", :event=>{:name=>"CB Clone 2 100$"}}]]}
```

5.11.4.2. Source Event Amount (\$150) > Target Event Amount (\$100)

Transaction Summary		
Target Event Amount	\$100.00	<input checked="" type="radio"/> Automatically refund the difference of \$50.00 as Credit Book balance.
Amount Previously Paid	\$115.00	<input type="radio"/> Automatically refund the difference of \$50.00 to your Credit Card.
Amount Paid with Credit Book	\$35.00	
<hr/>		
Difference	-\$50.00	

Fig. 5.11.1. Transaction Summary source event fee > target event amount

Number of invoices: 2

Invoice 1 - Transfer Out

Invoice total: \$-150

Refund Payment method:

- Transfer for the Credit Card payment amount
- Transfer for the Credit Book payment amount

Amount:

- \$-115 Credit Card
- \$-35 Credit Book

Person 1
Person 2

Date

```
{:invoice_id=>"9473849372744628672",
:invoice_url=>

"http://golfgenius.com/customers/16313/transaction_logs?invoice_entry_id=9
473849372744628672",
:total=>"-150.00",
:subtotal=>"-150.00",
:tax=>"0.00",
:date=>"2023-04-24",
:payments=>
[{:typeId=>"95c7601c-870e-4b9e-9c16-294cac394a28",
:transactionNumber=>"ie_9473849372744628672_ce_285",
:amount=>"-150.00"}],
:products=>
[{:id=>"2023-PGA_Champ-AXS-Food_Oak_Hill",
:quantity=>1,
:price=>"-150.00",
:total=>"-150.00",
:unit_price=>"-150.00",
:subtotal=>"-150.00",
:tax=>"0.00",
:product=>{:name=>"18 PGA REACH Development", :event=>{:name=>"CB
Clone 150$"}}]]}
```

Invoice 2 - Transfer In

Invoice total: \$100

Payment method:

- Transfer for the Credit Book payment amount
- x for the Credit Card payment amount

Amount:

- \$65 Credit Card

Refunding 50 to his credit card / Credit book depending on the selected option

- \$35 Credit Book

```
{:invoice_id=>"9473849373650598337",
:invoice_url=>

"http://golfgenius.com/customers/16313/transaction_logs?invoice_entry_id=9
473849373650598337",
:total=>"100.00",
:subtotal=>"100.00",
:tax=>"0.00",
:date=>"2023-04-24",
:payments=>
```

Person 1
Person 2

Date

```
[{:typeId=>"95c7601c-870e-4b9e-9c16-294cac394a28",
 :transactionNumber=>"ie_9473849373650598337_ce_285",
 :amount=>"100.00"}],
:products=>
[{:id=>"2023-PGA_Champ-AXS-Food_Oak_Hill",
 :quantity=>1,
 :price=>"100.00",
 :total=>"100.00",
 :unit_price=>"100.00",
 :subtotal=>"100.00",
 :tax=>"0.00",
 :product=>{:name=>"18 PGA REACH Development", :event=>{:name=>"CB
Clone 2 100$"}}]]}
```

5.11.4.3. Source Event Amount (\$100) < Target Event Amount (\$150)

Number of invoices: 2

Invoice 1 - Transfer Out

Invoice total: \$-100

Refund Payment method:

- Transfer for the Credit Card payment amount
- Transfer for the Credit Book payment amount

Amount:

- \$-85 Credit Card
- \$-15 Credit Book

```
{:invoice_id=>"9473849372744628672",
:invoice_url=>

"http://golfgenius.com/customers/16313/transaction_logs?invoice_entry_id=9
473849372744628672",
:total=>"-100.00",
:subtotal=>"-100.00",
:tax=>"0.00",
:date=>"2023-04-24",
:payments=>
[{:typeId=>"95c7601c-870e-4b9e-9c16-294cac394a28",
 :transactionNumber=>"ie_9473849372744628672_ce_285",
 :amount=>"-100.00"}],
:products=>
[{:id=>"2023-PGA_Champ-AXS-Food_Oak_Hill",
 :quantity=>1,
```

Person 1
Person 2

Date

```
:price=>"-100.00",
:total=>"-100.00",
:unit_price=>"-100.00",
:subtotal=>"-100.00",
:tax=>"0.00",
:product=>{:name=>"18 PGA REACH Development", :event=>{:name=>"CB
Clone 100$"}{}]}]
```

Invoice 2 - Transfer In

Here it depends on the option selected in the transfer form.

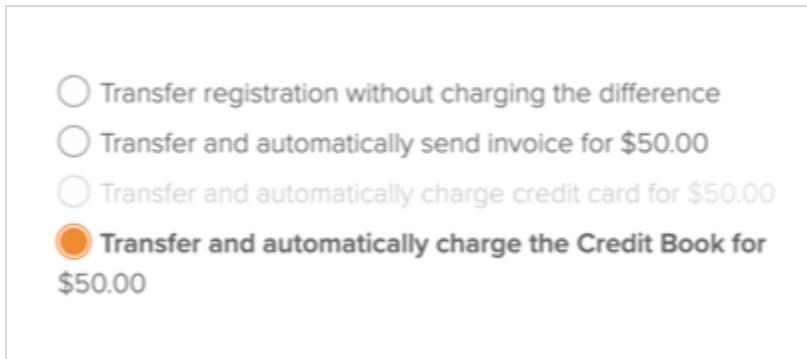


Fig. 5.11.2. Transfer and automatically charge the Credit Book

Invoice total: \$150

Payment method:

- Transfer for the Credit Book payment amount
- Transfer for the Credit Card payment amount

Amount:

- \$85 Credit Card
- \$65 Credit Book

```
{:invoice_id=>"9473849373650598337",
:invoice_url=>

"http://golfgenius.com/customers/16313/transaction_logs?invoice_entry_id=9
473849373650598337",
:total=>"150.00",
:subtotal=>"150.00",
:tax=>"0.00",
:date=>"2023-04-24",
:payments=>
[{:typeId=>"95c7601c-870e-4b9e-9c16-294cac394a28",
```

Person 1
Person 2

Date

```
:transactionNumber=>"ie_9473849373650598337_ce_285",
:amount=>"150.00"}],
:products=>
[{:id=>"2023-PGA_Champ-AXS-Food_Oak_Hill",
:quantity=>1,
:price=>"150.00",
:total=>"150.00",
:unit_price=>"150.00",
:subtotal=>"150.00",
:tax=>"0.00",
:product=>{:name=>"18 PGA REACH Development", :event=>{:name=>"CB
Clone 2 150$"}}]]}
```

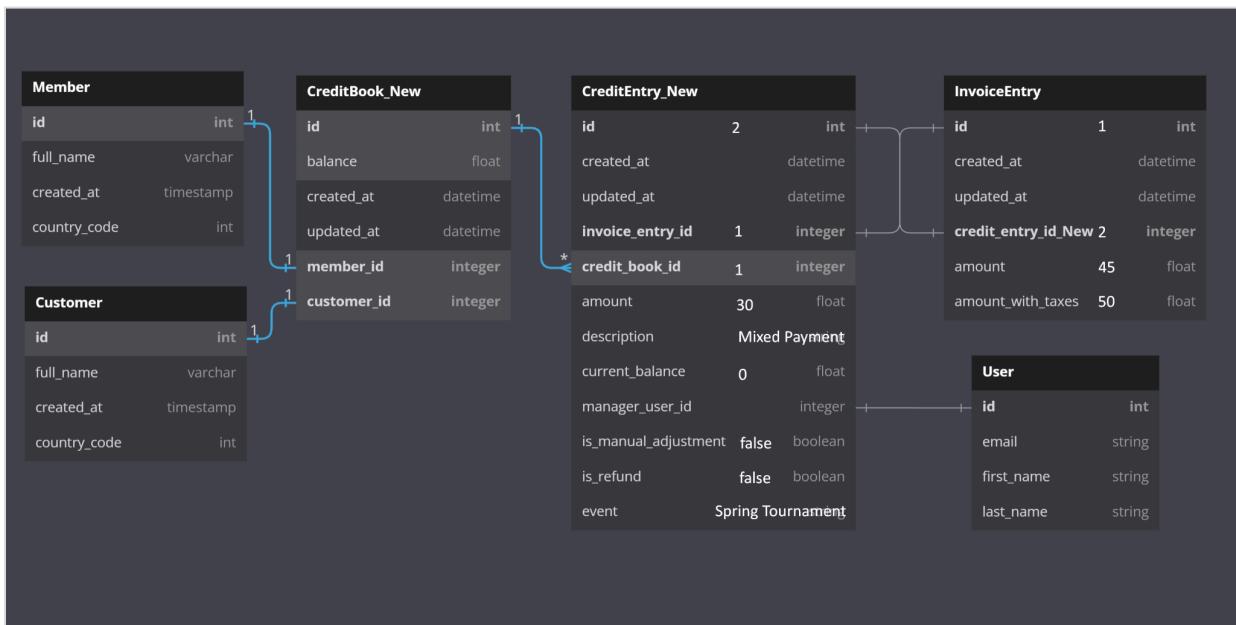


Fig. 5.11.3. The diagram below shows the data from a mixed payment of \$80 (\$50 paid with CC and \$30 with CB)

5.11.5. PGA Integration

Admin Setup

In order for a customer account to have access to the functionality described in this report, the customer needs to be enabled for the PGA of America - Financial Integration as described in the screenshot below.

Person 1

Person 2

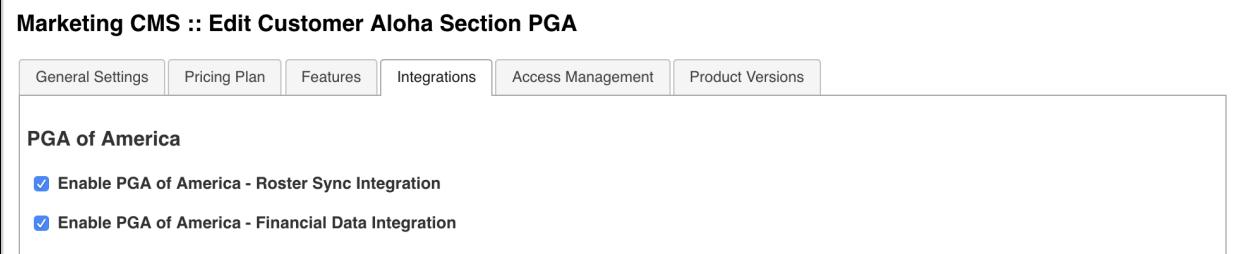
Date

Marketing CMS :: Edit Customer Aloha Section PGA

General Settings Pricing Plan Features Integrations Access Management Product Versions

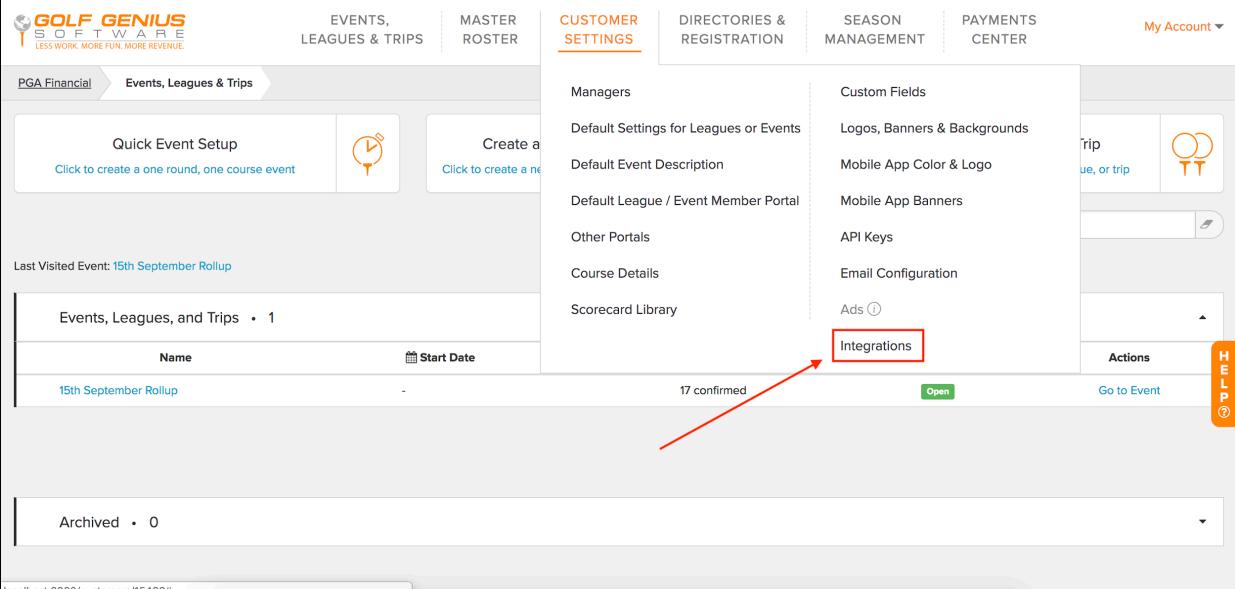
PGA of America

Enable PGA of America - Roster Sync Integration
 Enable PGA of America - Financial Data Integration



4.1. Setting up the Financial API Sync

The Financial API integration is set up on the Integration page. This is accessed from the Customer Center -> Customer Settings -> Integrations.



The screenshot shows the Golf Genius Software interface. At the top, there's a navigation bar with tabs: EVENTS, LEAGUES & TRIPS, MASTER ROSTER, CUSTOMER SETTINGS (which is underlined), DIRECTORIES & REGISTRATION, SEASON MANAGEMENT, and PAYMENTS CENTER. On the right side, there's a sidebar with various settings like Managers, Default Settings for Leagues or Events, and so on. At the bottom of the sidebar, there's a red box around the word 'Integrations'. A red arrow points from the text above to this red box. The URL at the bottom of the browser window is 'localhost:3000/customers/15466#'

On the Integration Setup page, the PGA of America tab only shows up for PGA of America customers. This tab allows setting up the access key, secret key, etc.

After the Access Key and Secret Key are filled in, we will exercise the API to load Events, Products and Payment Types as a test. For troubleshooting purposes, the Secret Key can be shown / hidden by clicking the Show / Hide Secret Key link, if the current user is an admin.

Once the Access Key and Secret Key are set, you are required to select some defaults for payments involving Credit Book.

Person 1
Person 2

Date

The screenshot shows the 'Integration Setup' section of the PGA of America website. It includes fields for 'Access Key' (containing 'AKIAJPHPBFTZVTCUUUFQ'), 'Secret Key' (redacted), 'Default Payment Method' (set to 'REACH - Stripe (PGA Foundation) (912_STR_01)'), 'Default Transfer Payment Method' (set to 'Transfer (PGA of America) (310_PTC)'), and 'Default Product for Manual Adjustment' (set to 'Integration Transfer Event - PGA General Event - Transfer Credit A...'). The top navigation bar shows 'Customer Settings' and 'Integration Setup'.

Default Payment Method: this will be used for payments made with Credit Book (registrations, memberships, etc.)

Default Transfer Payment Method: this will be used for transfers between events and also refunds to Credit Book.

Default Product for Manual Adjustment: this will be used for reporting any Manual Adjustments that are being made from the Credit Book Logs page.

Please note that in order for these transactions to sync to the PGA of America Financial API, the Default Payment Method and Default Transfer Payment Method you set in the Integration Setup Page must be the same as the ones you set at event level. For the event level settings, follow the next steps:

The screenshot shows the 'Event' dashboard for the 2023 Pinehurst Pro-Am. The 'Registration Payments' section is highlighted with a red arrow. Other sections visible include 'Event Administration' (with links to Event Profile, Course Details, Custom Fields, Payment Center, Registration Center, Registration Payments, and Invitation List), 'Multi-Round Tools' (with links to Multi-Round Series, Round Robin Schedule, Bracket Tournaments, Multi-Round Tournaments, Wave Pairings, and Event Standings), 'Personalize Your Event' (with links to Logos, Banners & Backgrounds, Photo Gallery, Event Talk, Manager Forum, and Event Dashboard), 'Event Managers' (with a link to Add / Remove / Reinvoke Manager), and 'Customer Managers' (listing Barb Creveling, Brian Schulte, Cassie Vogel, Courtney Curcio, and 14 other managers). The top navigation bar shows 'Customer Center' and 'My account'.

Person 1
Person 2

Date

We will be using Stripe Connect to process payments. You will use your own Stripe account where you have full access over your funds: transfers, refunds and analytics.

Payment Gateway
Philadelphia Section PGA Inc

[\\$ | Connect Another Stripe Account](#)

[Registration Options](#) [Add-ons](#) [Additional Options](#) **PGA: Financial API** [Registration Report](#)

[+ New Registration Option](#)

Payment Method
Please select the corresponding PGA of America Payment Method from the list below
REACH - Stripe (PGA Foundation) (912_STR_01)

Please select the corresponding PGA of America Payment Method for registration transfers from the list below
Transfer (PGA Tournament Corp) (606_PTC)
The selected payment methods are different from those set in Customer > Integrations. Credit Book cannot be used in this event.

If the options do not coincide, a warning message will appear at the bottom of this section, as displayed above. Make sure that you also select an option for the other fields (this is mandatory).

After making changes here, press Save and go back to this page to check if the warning message is still there. There will also be no warning next to the title of the tab PGA: Financial API if everything is set.

We will be using Stripe Connect to process payments. You will use your own Stripe account where you have full access over your funds: transfers, refunds and analytics.

Payment Gateway
Philadelphia Section PGA Inc

[\\$ | Connect Another Stripe Account](#)

[Registration Options](#) [Add-ons](#) [Additional Options](#) **PGA: Financial API** [Registration Report](#)

[+ New Registration Option](#)

If the correct options are set, then you can proceed to make a payment.

Event :	Player :	Description :	Date and Time ▲	Amount :	Status :	Cleared at	PGA of America	Actions
Fall Meeting & Golf	*****	Open Registration Fee for Fall M... ⓘ	10/19/2023, 06:49 AM	\$170.00 ⓘ	Paid / Cleared	10/19/2023, 07:39 AM	✓ ⓘ	▼

Person 1
Person 2

Date

The Transaction History entry should have a green checkmark under the PGA of America column if the setup was done right and the syncing process was completed.

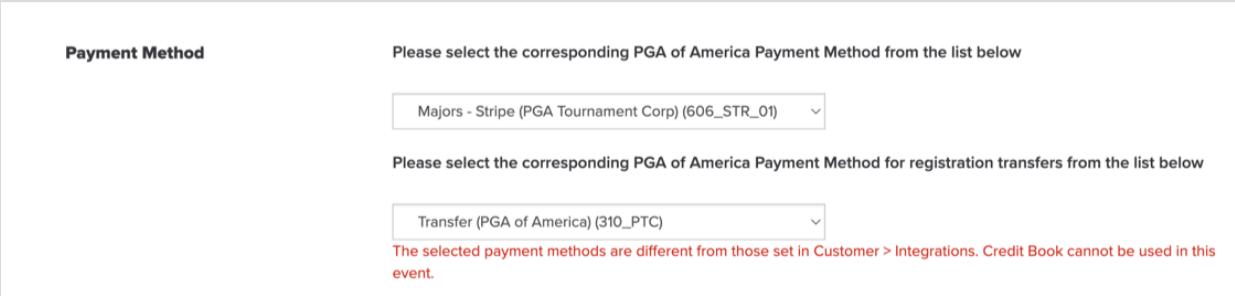
6. Future Work

6.1. Credit Book Future work Items

 [FEEDBACK][Iliuta P., Andrei V.] Credit Book

6.2. Other items

1. Clear all (Credit Book)
 - Bill's suggestion: "I do believe there should be a clear all balances option for a manager that takes all balances to \$0 and automatically produces a spreadsheet of the players and balances prior to zeroing out the accounts"
2. Make the following error message dynamic:



The screenshot shows a user interface for selecting payment methods. It consists of two main sections: one for 'Payment Method' and one for 'Transfer (PGA of America)'. Both sections include dropdown menus and a note about selected payment methods being different from those in Customer > Integrations.

Payment Method	Description
Majors - Stripe (PGA Tournament Corp) (606_STR_01)	Please select the corresponding PGA of America Payment Method from the list below

Transfer (PGA of America)	Description
Transfer (PGA of America) (310_PTC)	Please select the corresponding PGA of America Payment Method for registration transfers from the list below

The selected payment methods are different from those set in Customer > Integrations. Credit Book cannot be used in this event.

Fig. 6.2.1. Showcase the current message

3. Add a search field by CE ID in the CE page which would show up only if we have the PGA Financial Integration enabled.
4. Email Templates

We will add 2 new email templates to the existing set:

- Manual Credit Adjustment
 - sent when the manager adjusts a player's Credit Book Balance (increasing or decreasing).
 - Template can be found under Customer Settings > Email Configuration > Other

Person 1
Person 2

Date

Here you can view a set of e-mail notifications golfers receive when certain actions are completed (e.g., a golfer registers for an event). You can enable or disable these e-mail notifications and you can customize their content using a number of data fields. You can also control the staff member in charge with specific golfer communication.

Reset Templates

Name	Actions
Master Roster Registration • 5	
Membership Program Registration • 6	
Event Registration • 24	
Round Signups • 7	
Round Results • 1	
Other • 1	
When golfer asks to resubscribe for promotional emails...	Edit
When a manager manually adjusts the Credit Book Balance...	Edit
Invoices • 1	

HELP

Fig. 6.2.2. Showcase the current email templates

- Registration Payments with credits
 - Sent when any payment with credits is made (registering for an event through open registration, transfer registration)
 - Template can be found in Email Configuration > Event Registration

Master Roster Registration • 5

Membership Program Registration • 6

Event Registration • 24

When golfer registers for event and is confirmed (with skipped payment)...	ON	Edit
When golfer registers on the pending list (with skipped payment)...	ON	Edit
When golfer registers on the waitlist (with skipped payment)...	ON	Edit
When golfer is transferred	ON	Edit
When golfer is transferred with refund	ON	Edit
When golfer is transferred with invoice	ON	Edit
When golfer is transferred with automatic charge	ON	Edit
When golfer receives a split team payment notice...	ON	Edit
When golfer pays with credits...	ON	Edit

Round Signups • 7

Round Results • 1

Other • 1

Invoices • 1

HELP

Fig. 6.2.3. Registration payments with credits

Person 1
Person 2

Date

We will also add several **Credit Book related data-fields**, such as %credits_amount%, so that the rest of the templates can include credits usage information (e.g. if a golfer cancels his / her registration, then the cancel registration email templates can be updated to include information about the credits that were returned to the golfer's Credit Book balance through the refund - if applicable).

- Better define the variable names
- Add these two fields: %credit_used% %credit_balance%

5. Email Invoice
6. Print receipt is not available for payments made full in CB

Description: Print receipt is not available for payments made full in CB.

Print receipt should be displayed in:

- Transaction history page
- Your registration page from portal
- Player dashboard from portal

Steps to reproduce:

1. Register a user and pay fully in CB
2. Navigate to transaction history page
3. Select actions dropdown

Actual behavior: Print receipt is not available for payments made full in CB

Expected behavior: Print receipt is available for payments made full in CB

7. Demo

Video demo can be seen here:

https://drive.google.com/file/d/13ynMlmxAIGZy13GvttG2ex6R1gnEmx9z/view?usp=drive_link

Timeline

Introduction (0:10 - 0:27)

Introducing the feature to simplify money transfers and bank statements.
Explaining how customers can manage refunds as virtual balances.

Scenario with Aaron (0:27 - 1:55)

Introducing Aaron, a PGA junior who received a scholarship of \$300.

Person 1
Person 2

Date

Describing three ways to add funds to a credit book: through the master profile, credit book management page, and refunding successful credit card payments.

Adjusting Aaron's credit book balance to \$300 in the master roster.

Credit Book Management (1:55 - 3:12)

Exploring Aaron's profile, showcasing the credit book tab and his current balance.

Demonstrating balance adjustment, filtering, and advanced options.

Event Registration (3:12 - 5:01)

Switching to Aaron's point of view on the event portal page.

Checking Aaron's credit book balance on the player dashboard.

Registering for an event using credit book funds, covering the registration fee.

Mixed Payment (5:01 - 5:29):

Registering a friend for the event, with a portion paid by credit card and the rest from the credit book.

Transaction Management (5:29 - 7:45)

Accessing the credit book management page to view transactions.

Filtering and managing transactions, demonstrating manual adjustments and registrations.

Refunds (7:45 - 8:53)

Showing how to generate refunds and refund amounts to the credit book.

Highlighting the bulk balance adjustment function and its options.

Additional Features (8:53 - 10:57)

Exploring other features like date filters, Excel export, and ongoing improvements.

Mentioning feedback and problem-solving through regular calls.

Conclusion (10:57 - 11:03)

Emphasizing the unique nature of the feature in the golf industry and its potential to change payment practices.

8. Appendix

RTM: [RTM-281](#), [RTM-330](#)

Release Approval Document: [Credit Book - October 17, 2023](#)

Person 1

Person 2

Date

Edge cases: [link](#)

Staging customer with transactions: [\[link\]](#)

Split Payments report: [\[link\]](#)

PGA Financial API documentation:

 [SPEC] PGA of America - Financial API

 [SPEC][Raul, Mircea, Cristi B.] Transfer Event Registration from one event to another