CMGC Web Site User Guide

(Nov 2019)

# Saving Files as CSV (Comma Separated Value)

WebAdmin requires files to be in the CSV format. The CSV format is very basic. It just has the data and commas to separate the data. If you open the roster file (csv format) in notepad, the first line looks like this:

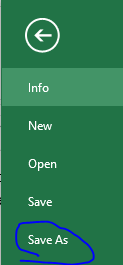
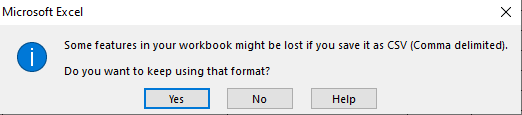
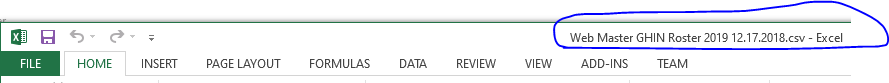
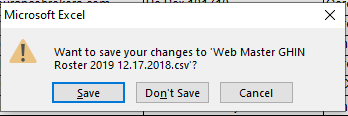
Name,GHIN #,Email Address,Address,City,State,Zip,DOB,Type

If you open the roster file (Excel format or CSV format) in Excel, it looks like this:



The Excel format file contains additional data about each item: data type, font, alignment, etc. WebAdmin does not need this additional data, so you have to save files in CSV format which is easier for WebAdmin to read.

Here is how to save an Excel file to CSV:

1. Click the File tab  
   
2. On the File tab, click on Save As  
   
3. Select the folder to save the file, which will open a dialog. Change the file name if you want. Some people add “CSV” to the file name since the file system does not show you the file type by default. So, if the file is named “Roster”, they rename it to “Roster CSV”.
4. Change the Save Type as field to CSV. (CSV will be listed 3 times. Make sure you select the one that is “Comma delimited” and not the Macintosh or MS-DOS choices.)  
   
5. Click Yes on the dialog below. (It is just warning you that all the Excel formatting data is not saved in the CSV file.)  
   
6. At this point, Excel has switched from your Excel file, to the CSV file. You can see the file name that it is showing in the Excel header is now the CSV file:  
     
     
   You should close Excel at this point. (Don’t edit the CSV file as this should be just a copy of the Excel file.) When you close Excel, Excel will ask you again if you want to save your changes. (I don’t know why it asks again.) Just click Don’t Save since the file has already been saved and you haven’t made any changes to the file.  
   

# Membership Activities

## Collecting Yearly Dues

Each year, in September and October, the yearly dues are collected. The website provides a link to show who has paid and who has not, and a link for them to pay their dues. These links show up based on the calendar date. No action is needed to turn them on and off.

The website is not the *master roster*. It is simply a way to communicate with the members that the club recognizes that they have paid or not.

There are 2 pages on the website to help keep track of payments. This one shows who has paid:

<https://coronadomensgolf.org/v2/dues_paid.php>

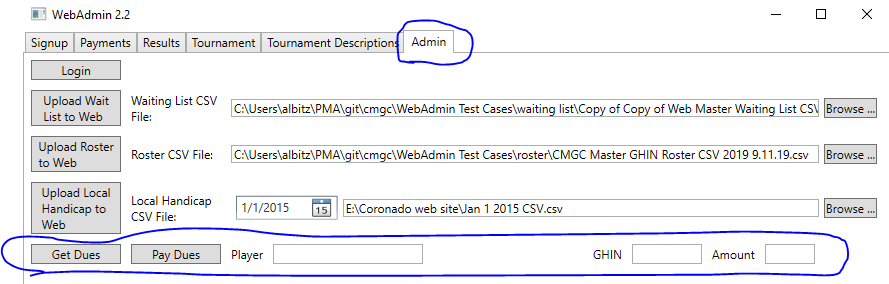
And this one shows who has not paid:

<https://coronadomensgolf.org/v2/dues_not_paid.php>

On the website home page, you see only the link that shows who has not paid. But, you may want to see the list of *paid* players to check against the excel spreadsheet you keep, so you can use the dues\_paid.php above to see that list.

When members pay by PayPal, PayPal communicates to the website that the payment has been made. The amount paid is saved for each member and the member no longer shows up in the dues not paid list.

Some people are going to pay to with a check. You have to tell the website that the payment has been made. To handle these cases, you can enter their payment with WebAdmin. At the Admin tab, there are buttons for “Get Dues” and “Pay Dues”.



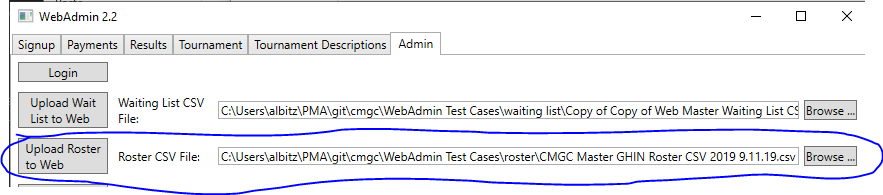
The intent is that you start typing in the last name in the player field above until it matches the player you want, then click on Get Dues. It should show the amount as 0 (when you click Get Dues), since they have given you a check. (If it is not zero, then you might have the wrong person.)  Then you can type in the check amount (just the amount, no dollar sign) and click on “Pay Dues”.  (For the dues\_not\_paid.php link above, any number that is not zero counts as paying dues.)

In order for you to be able to start typing the last name and have it complete the name and GHIN, you must have pointed WebAdmin to the roster .csv file, which is you can see next to the “Upload Roster to Web” above. (Notice, this is the .csv file, not the excel roster file. You have to save the roster to .csv, which is a simpler file format to read by a program.)

## Uploading the Master Roster

The master roster is an excel file containing the list of currently active members. The contents of this file should be loaded onto the website after each change to the membership. Also, some operations (like typing in the player’s name for closest to the pin) use the roster to auto-complete the name. WebAdmin only uses a CSV version of this file.

The data is uploaded to the website using the Admin tab in WebAdmin. Select the CSV file containing the roster data and click on Upload Roster to Web.



When you upload new roster data, what the website does is to mark all the existing roster data in the SQL database as *inactive*, all the new roster data is added to the SQL file (updating existing players and adding any new players), and all the new roster players are marked *active*. What this means is that all the old players are still in the website SQL file. Instead of deleting the old players, they are just marked as *inactive*. So, if you accidentally delete someone from the roster file, all that happens is when they try to sign up for a tournament, it says they are not an *active* player anymore.

### Roster file format

The website keeps a copy of this data from the roster file: Name, GHIN #, Email Address, DOB, and Type. There must be columns in the file with the exact strings above as column headers as shown here:



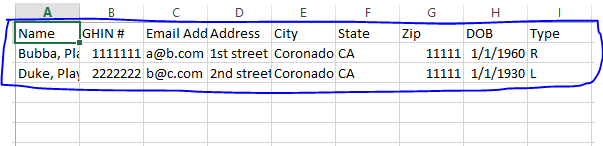
The rest of the columns are ignored by WebAdmin.

The Type field must be one of the following:

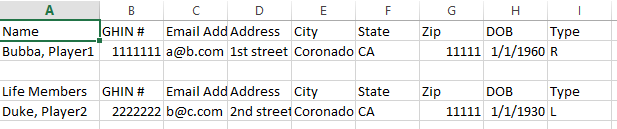
* R – Regular
* L – Lifetime
* H – Honorary
* J – Junior

WebAdmin does not care if the names are sorted alphabetically. All the data is loaded into an SQL file on the website and SQL will sort the data when it is looked up.

The data in the file must be “square” as shown in the following example. Square means all the expected columns are filled in for each row.



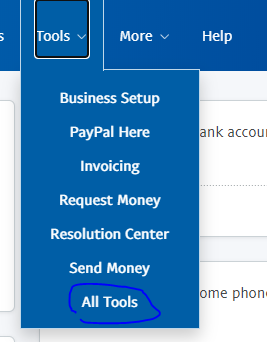
Do not create a 2nd “block” of data for non-roster data or to organize the roster data into chunks. The following example is not a valid file, since there is a blank line and a new header followed by more data. (The blank line is okay, but the 2nd header line is not.)



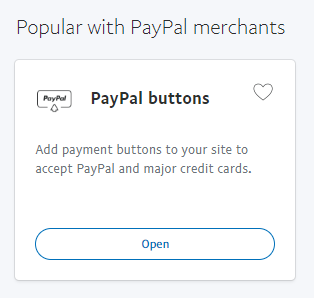
## PayPal Buttons

The website handles payments through PayPal buttons.

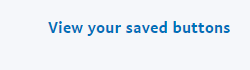
To get to the buttons, click on Tools->All Tools



Then click on Open for the PayPal buttons:

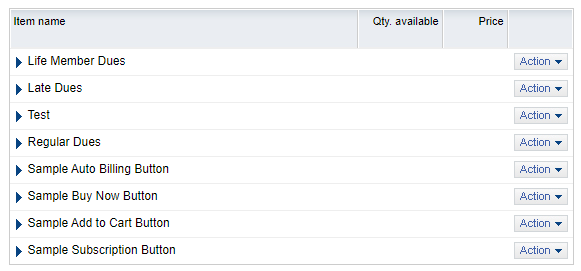


Then click on View your saved buttons (upper right)



Here is the list of buttons.  There are 3 dues buttons and a Test button. (The rest of the Sample buttons came from PayPal.)

Since the late fee for Life Members is the same as the regular fee, there is only 1 button for them.

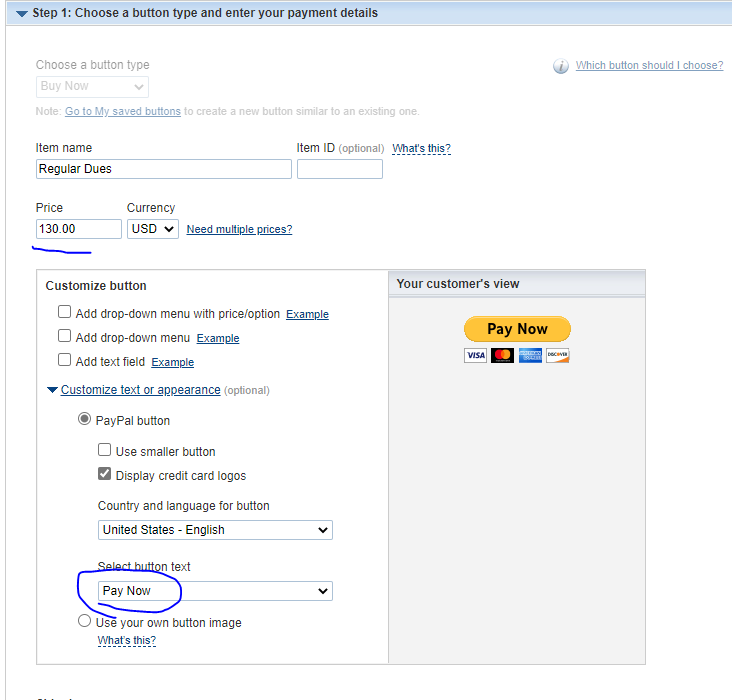


What is saved on the website is the ID (underlined below) and the amount. When it is time to change prices, click on the Edit button Action.



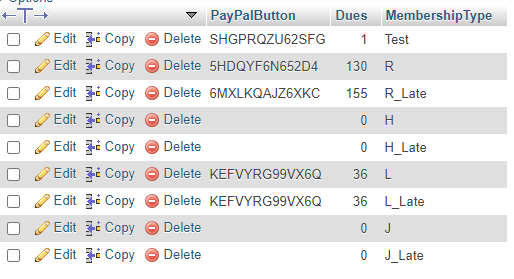
When you update the price, tell me what to change it to on the website.

Fyi – If you were to make new buttons, the one modification I make to the button is indicated below where I change the text of the button to Pay Now instead of Buy Now.



## Website Membership Data

Here is the data about the buttons on the website (in SQL). The membership type column matches the membership type for each player in the roster. Notice the Life members “L” use the same button, since there is no late fee for them. The “H” and “J” membership types do not pay yearly dues.



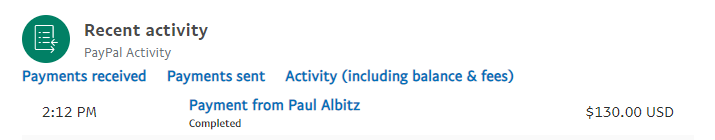
And after you pay, PayPal sends the website a notification and I add this record to the database:

cid:image008.png@01D66B36.A480AA70

cid:image009.png@01D66B36.A480AA70

## PayPal Custom Payment Field

If you click on the payment:



And scroll down, you’ll see a “Custom” field (shown below). This is the data that is sent back to the website, along with the payment information, so I know who the payment belongs to.

In the past, some people pay with a corporate card, so you don’t know who they are paying for. If you click on the payment and scroll down to the Custom field, you can see who the card is paying for.



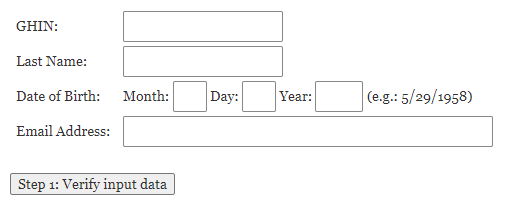
## Testing Dues Payments Before Sept 1

If you want to test paying for your dues before Sept 1, use this link with “skipdatecheck”:

<https://coronadomensgolf.org/v2/dues_payment.php?skipdatecheck=1>

## Updating DOB or Email address

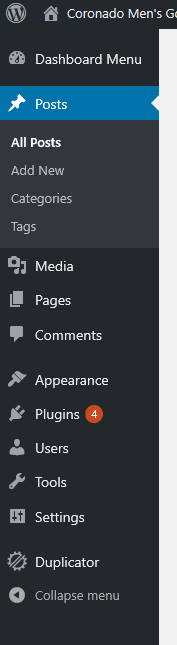
If at the verification step, the DOB or email does not match the roster data saved on the website, an email is send to [membership@coronadomensgolf.org](mailto:membership@coronadomensgolf.org). Since the website is just a copy of the roster, you have to update the field manually in the roster and then upload the roster to the website again.



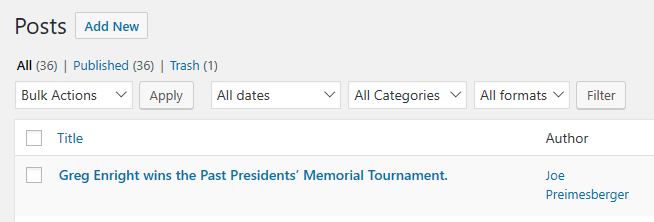
Home Page Posts

Login as editor: coronadomensgolf.org/wp/wp-login.php

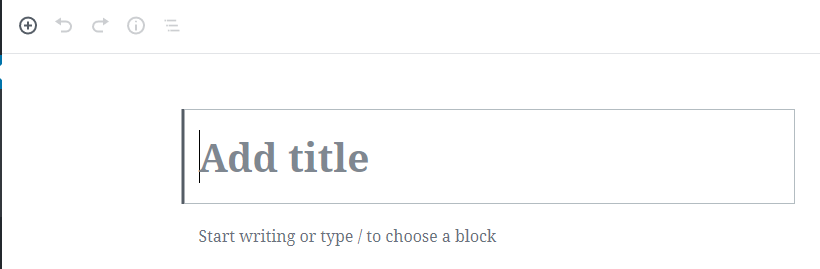
An editor has control over the content of the website. Mainly you will deal with “posts”, which are those messages on the home page. Posts are here in the menu:



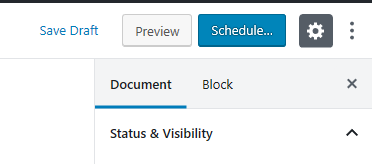
To add a new post, click on Add New:



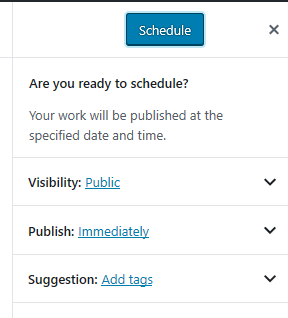
Fill in the title and text:



After you fill out the title and text, click on Schedule:



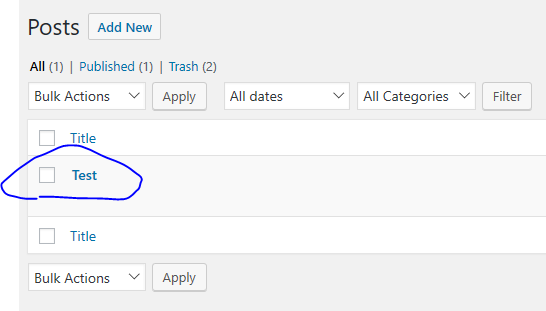
And click Schedule again:



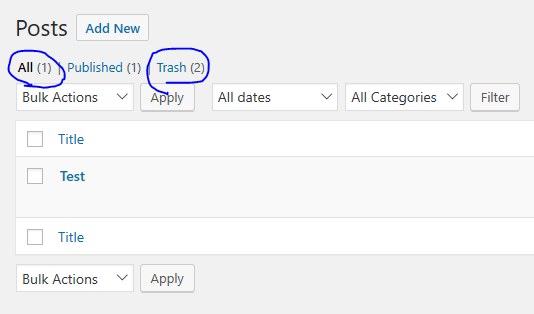
And then if you refresh the home page, you’ll see your new posting.

Now, only the last 10 posting show up on the home page. You should delete older postings.

You can delete by hovering over the posting and clicking “trash”. I can’t screen-grab this since the actions only show when you hover over the posting.

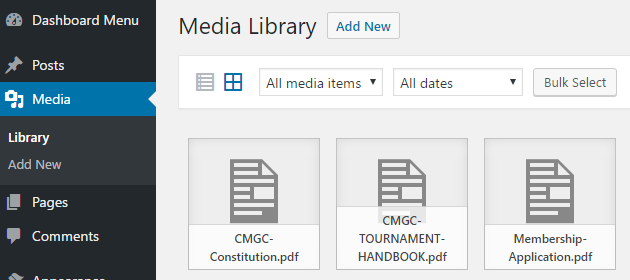


If you accidentally delete a posting and want it back, you can click on “trash” to recover it and click on “all” or “published” to return to the list:

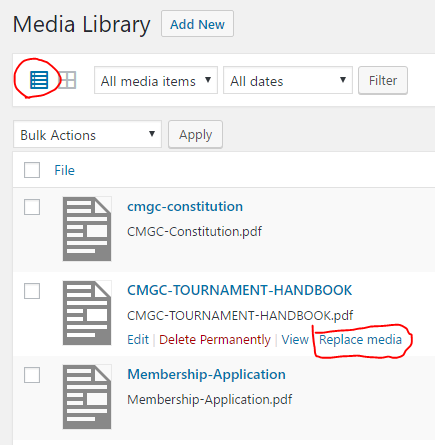


# Updating PDFs

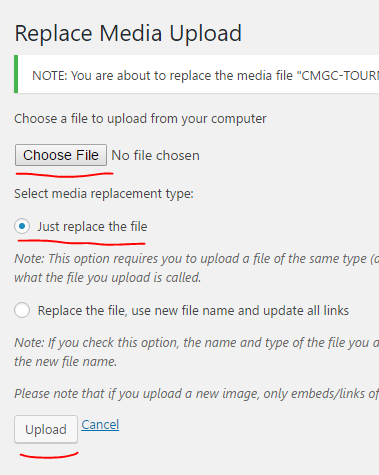
The constitution, tournament manual, and membership application are PDF files. In WordPress, these files are part of Media. After logging into WordPress, click on the **Media** button. You’ll see these documents as well as other files



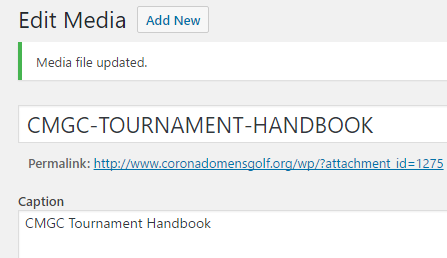
To update the PDF file, change to the list view and click on replace media:



Click on choose file and select the updated file. Leave the selection at **Just replace the file** and click Upload. (The **replace the file, use new file name and update all links**, doesn’t update menu items, so don’t use this option.)



After you click upload, you are done. You can update the Caption if needed (and click **Update** on the right).



If you viewed the original PDF and then you try viewing it again after your update, you may have to click on the refresh button in the browser, since the browser may be showing you the original PDF which it cached when you looked at it the first time.

Click on the **Media** button on the left to return to the full list of media files.