



# CLUB ADMINISTRATION – USER GUIDE

Last updated: Julian Foster 07/07/2023

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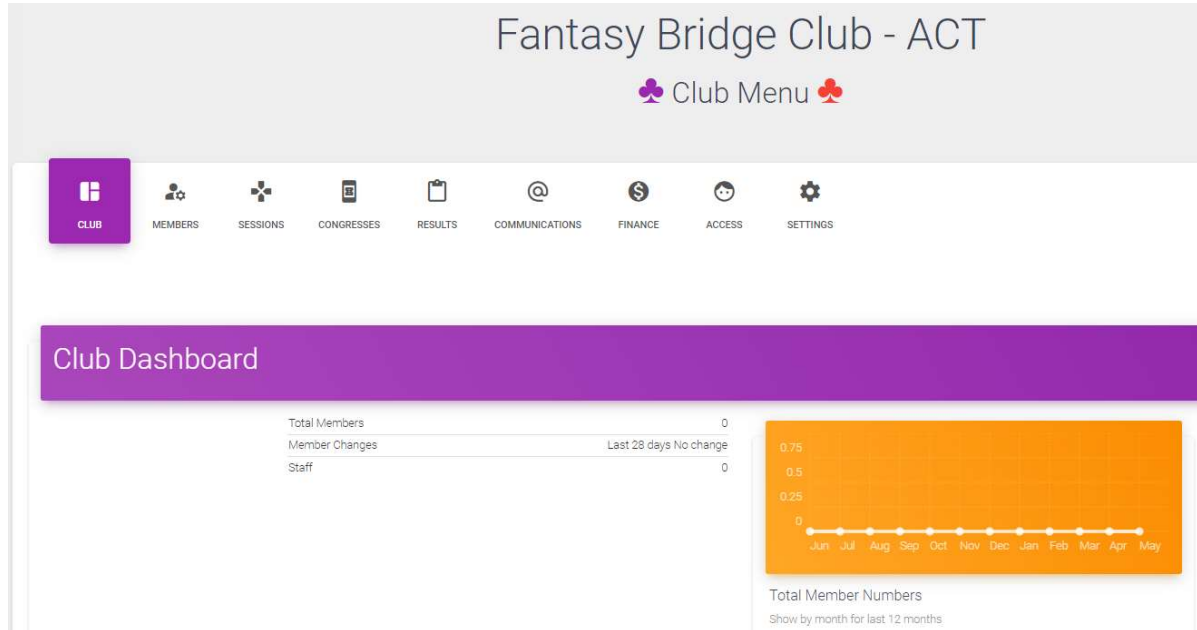
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# 1. Overview

## 1.1. Club Admin functions

My ABF contains a series of administrative functions for clubs. There is a Club Admin menu which looks like this (not every user will see all these parts – see section 3 below for more details):



The 9 primary areas are described below and in what section of this document they are covered:

Main Menu Item	Description	Section
Club	Dashboard showing high level information about your club and its members.	4
Members	Import and maintain a list of your members.	5
Sessions	Create sessions, import players, generate financial reconciliation and bridge credit charges.	6
Congresses	Set up and manage Series for congresses. Set up and manage congresses.	7
Results	Upload session results for display to players.	8
Communications	Send emails to members or tagged groups of members.	9
Finance	Access the club's bridge credits statement with the ABF.	10
Access	Manage who gets administration access to these areas.	11
Settings	Manage the club's basic details and assorted member, financial and session settings.	12

The rest of this document describes the different menu items, how to access them, and how to use the components in them.

## 1.2. What will be set up?

All clubs that were already set up in My ABF (i.e. those running congresses) have been contacted and migrated to this new administration structure.

All other clubs are being set up in My ABF (they all need to exist in the system prior to the Masterpoint Centre functions being migrated).

Clubs who have not nominated anyone to be their initial administrator have been set up with a dummy "ABF" user as secretary to ensure no-one can access their administration menu until they are ready to become active.

Initially all clubs will be set up with the basic access control option (see section 11 below for more details). It is then up to the club to determine if they wish to move to the advanced access option which allows them to refine access rights in specific areas and determine who has permission to change those access rights. Details are in section 11 below.

## 1.3. How does a club gain initial access to use the admin area?

Only clubs who wish to make active use of My ABF need to take any action.

**Any club wishing to use any of the club admin functions** will need to:

- Nominate who their initial administrator should be (usually the club secretary but can be anyone they choose). Contact My ABF Support or Julian Foster ([julian.foster@abf.com.au](mailto:julian.foster@abf.com.au)) who can set the club up and provide access to that administrator. An introductory guide is also provided.
- Gain familiarity with the admin menu
- Use the Access area (see section 0 below) to determine who should have access to the various areas
- Consider customising their Public Information page

## 1.4. What do clubs need to do to use specific areas?

**Clubs that wish to send emails to their members** through My ABF will need to do the following:

- Create their membership types
- Import their members and update the list to be current
- Manage email addresses for their “unregistered users” (i.e. members who are not registered in My ABF)
- Set up at least one template for their outgoing email(s)
- Optionally set up tags to be able to identify sub-groups of their members

**Clubs that wish to run a congress** will need to do the following:

- Establish who should have access to the Congress area
- Review the Tournament Organiser guidance material available (Checklist, Guide, Videos, etc)
- Set up the underlying “Series” for the Congress
- Create the Congress
- Complete the set up wizard to generate the Congress webpage

**Clubs that wish to use the functionality to accept payment for club sessions through bridge credits** will need to do the following:

- Create their membership types
- Create their payment types
- Create any miscellaneous categories of income they want to track
- Create their session types and assign \$ rates to them
- Import their members and update the list to be current

## 1.5. Where can clubs get more information?

See the Clubs page of the My ABF Resources webpage: <https://www.abf.com.au/member-services/my-abf-resources/clubs/>

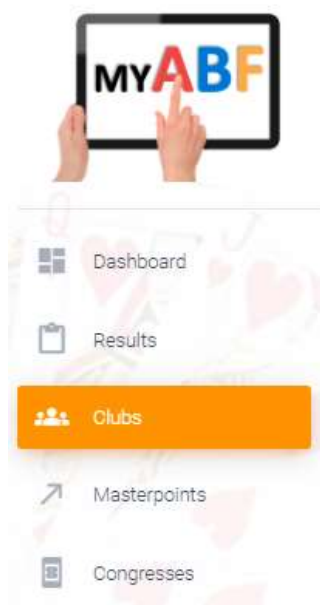
There is also extensive guidance material for running Congresses on the Tournament Organisers page: <https://www.abf.com.au/member-services/my-abf-resources/tournament-organisers/>

## 2. Accessing club administration features

There are assorted ways to access the new features.

### 2.1. Via the Clubs main menu item

Every user will now see a Clubs listing on their main menu:



This page lists all the clubs set up in My ABF (it will ultimately replicate the listing of clubs currently available in the Masterpoint Centre).

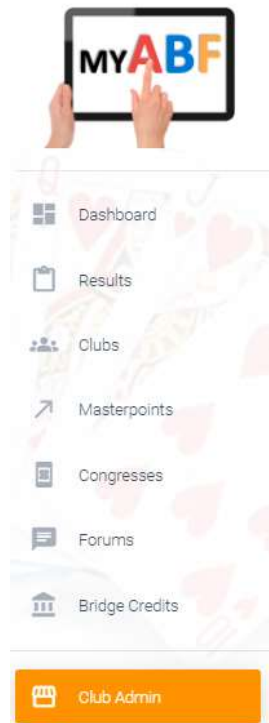
It also shows the clubs that the user has administration access to – with a link to open the Club admin menu in the latter case.



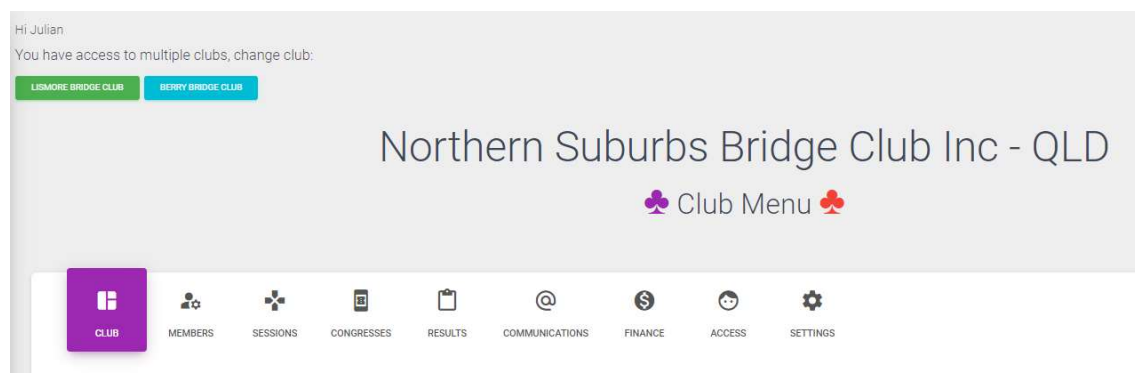
This page will be revised as all club membership information is transferred to My ABF.

## 2.2. Via the Club Admin Menu item (much easier)

Where you have some admin rights for a club, you will also see a Club Admin main menu item:



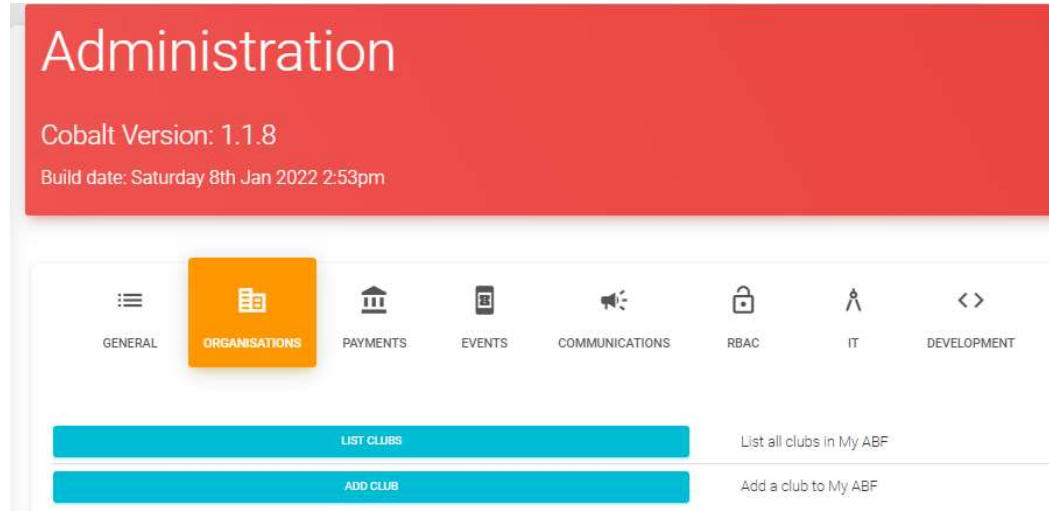
This will directly open the Club menu. If you have access to multiple clubs you will be able to toggle between them using buttons at the top (the system will remember this selection so when you re-open this screen it will return you to the last club you were in).





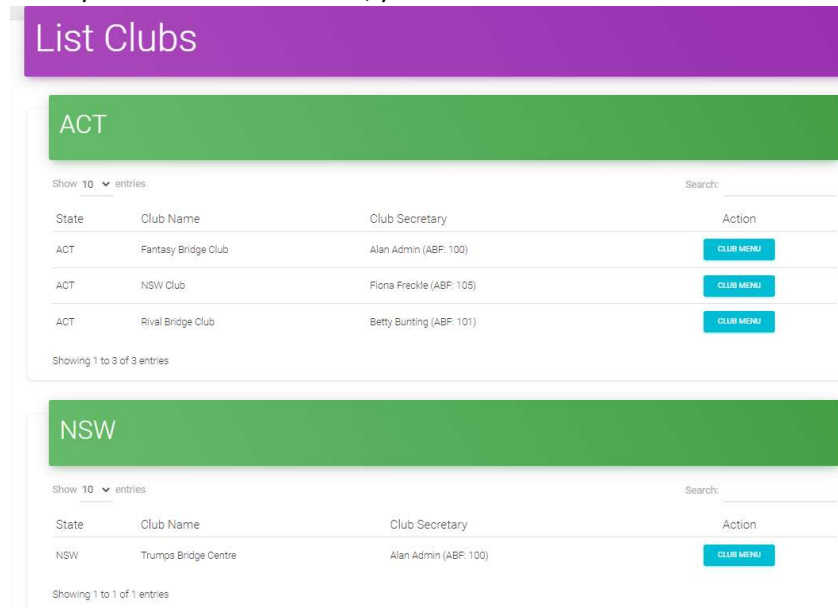
## 2.3. Via the main Admin menu

Users with higher level access (e.g. State or ABF level; or those with some level of IT system access) will also be able to see an overall Admin menu. They can also access clubs through that menu by selecting Organisations:



Everyone with access to this menu will be able to see the List Clubs button. You will only see the Add Club button if you have specific administration rights allowing you to create clubs.

After clicking List Clubs you will see a list of all the clubs by State that have been set up and, for those you have admin access to, you will see a Club Menu button:

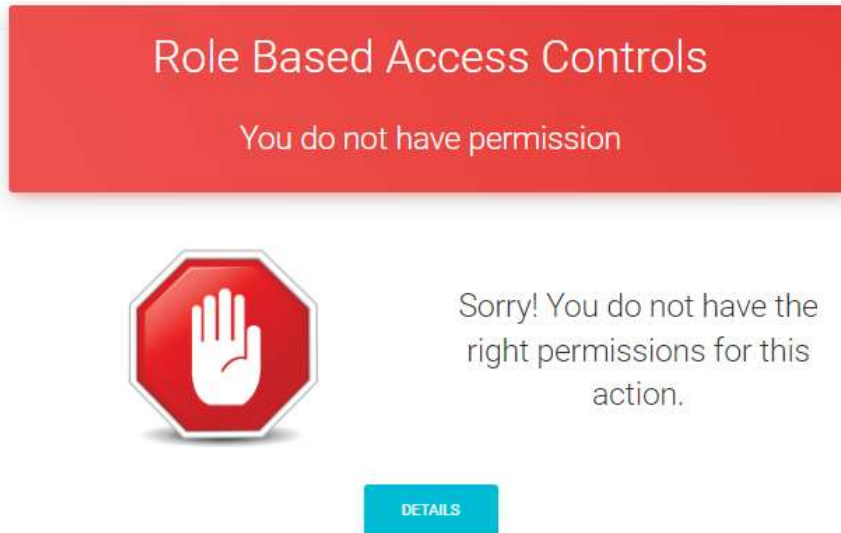


Clicking on the Club Menu button will open that club's admin menu.

### 3. Limitations on access rights

Not every user will be able to see or access all the areas in the Club Admin menu. Which parts you see will depend on the access rights you have (these are described in section 0 below).

Some parts are hidden unless the user has access, some parts remain visible but use is blocked unless a user has access. A screen like the following will appear if a user attempts to access an area they don't have the right permissions to use:



Clicking on Details will provide further explanation of why they cannot access the area and who to contact if they wish to have access added.

## MAJOR SECTIONS OF THE CLUB ADMIN MENU

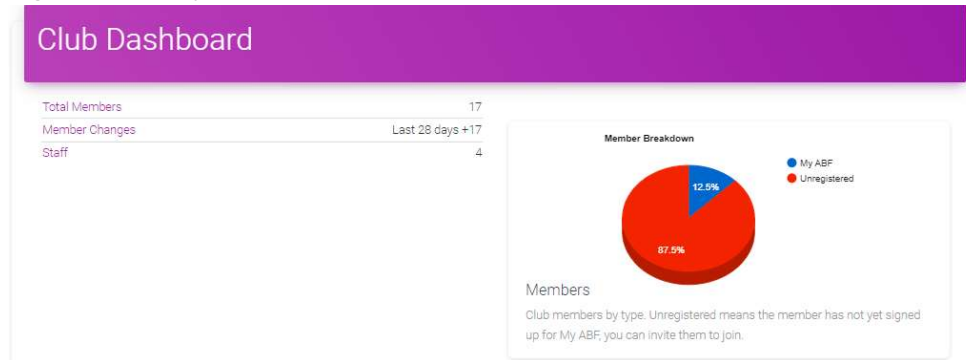
The contents and functionality of each section is described below.

### 4. Club

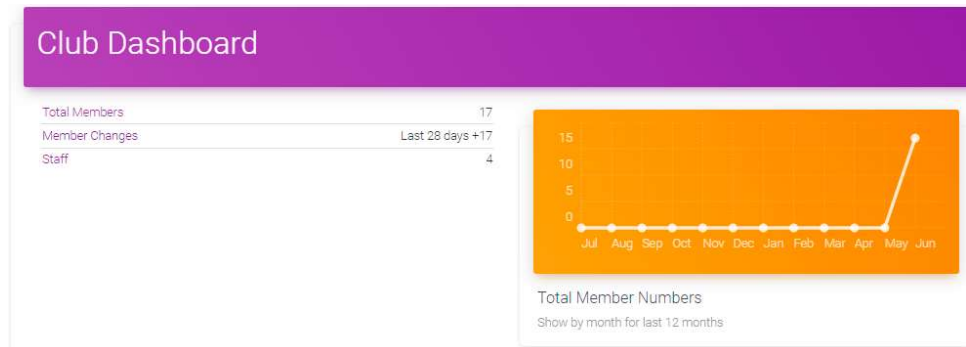


This is a top-level dashboard for your club. This will probably evolve over time but at this stage it just shows total members, changes in the last month and how many staff (administrators) the club has. If you click on each of these you will see different graphics on the right.

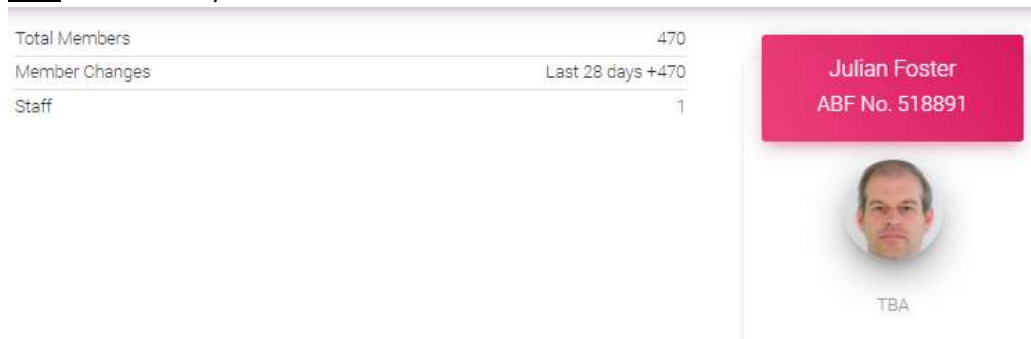
Total members (the default view) shows a pie chart with the breakdown of members between those registered for My ABF and those not:



Member changes has a graph showing the movement in the club's membership numbers:



Staff shows the My ABF users who have administration roles for the club:



## 5. Members



This area gives you the ability to view and import/edit the list of members for your club.

### 5.1. Introduction – and purpose of the functionality

The purpose of doing this is to track who your club's current members are. That's needed for three possible purposes:

- If you are going to use the Communications section to send emails to members or groups of members (see 0 below).
- If you are going to use functionality coming in the next release where players can be charged bridge credits for club sessions. That's because almost all clubs charge a different amount of table money for members and visitors and some also charge different amounts depending on the type of member. Therefore it is necessary for My ABF to know who your club's members are at any point in time to be able to charge them the right table money.
- If, in future, you wish to run a Congress which is limited to members or to charge different entry fees for members and non-members.

At this stage the membership function is limited to maintaining a list of your CURRENT members and that's it. There are two changes to come in future:

- Managing your home club members (for now that function remains within the ABF Masterpoint Centre as it is still used by the ABF to calculate capitation fees each year – once those functions are transferred to My ABF later in 2023, home club records will also be tracked).
- Tracking your member's renewal dates and, if you wish, allowing them to pay their annual membership renewal fee with bridge credits as well.

When using basic access control, everyone with administrative rights to your club will be able to access all parts of this area. When using advanced access control rights can be separately given to users to edit member records. This gives those users (and only those users) the ability to:

- Add members
- Edit member records
- Download a csv report of members' details

For more information about access control, see section 0 below.

## 5.2. Registered and Unregistered users

Obviously not everyone with an ABF number has signed up to My ABF. That means when your club creates its list of members, some will already have My ABF accounts (we call these “Registered users”) and some will not (we call these “Unregistered users”). They are handled slightly differently in My ABF and you will be able to invite your member who are unregistered to join.

Users (both registered and unregistered) can of course be members of more than one club.

There are 3 possible scenarios that can occur when you add a member:

1	They are already a registered My ABF user	You can add this user as a member of your club.
2	They are already an unregistered My ABF user	They have not signed up for My ABF but another club has already added them as a member. You are now adding them as a member of your club as well.
3	They are not currently a My ABF user at all	They have not signed up for My ABF and no other club has added them as a member. This means you will be the first club to add this member to the system.

The primary difference between Registered and Unregistered Users is in how you manage email communications with them. Registered users already have an email address within My ABF and they control what that is. For Unregistered users clubs need to maintain email addresses for those users – see section 5.8 below for more details on how to do this.

## 5.3. The process to add your members

Although members can be added manually it is far more efficient to import a list to get set up initially.

For most clubs it will be simplest to import members from the ABF Masterpoint Centre (noting that these will be home club members only) and then add any non-home club members.

Larger clubs who maintain their membership list in another product (Pianola, Compscore, etc) will probably find it easier to import from that.

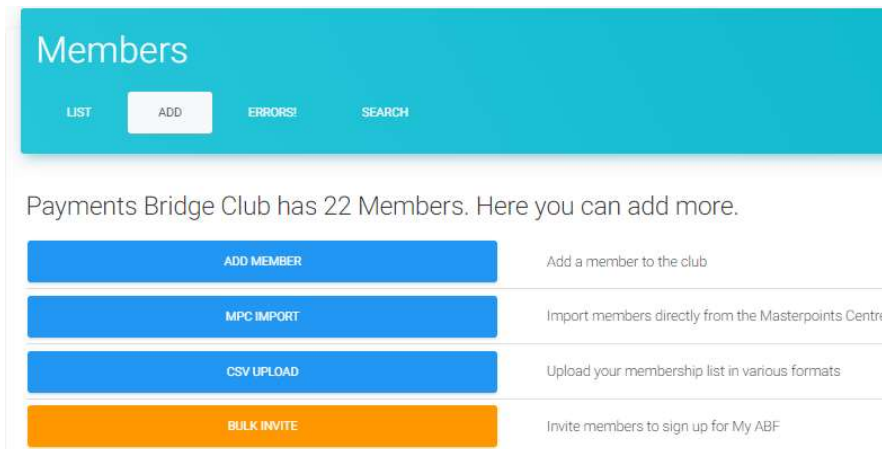
It is also possible to set up a generic csv file using defined column headings and import a member list from that.

Clubs who charge different table money for different types of members will need to set up the member types and import those groups separately.

The different ways of adding members are described in the next section.

## 5.4. Ways of adding members

There are three ways you can add members to your club.



It is also possible to email all unregistered members to invite them to sign up to become registered members (something all clubs should be encouraging) – see 5.7 below..

### 5.4.1. Add manually

Click Add Member. Here you can search for a player by name in the ABF Masterpoint Centre and add them as a member of your club.

This is most likely to be used when you already have a list of members and you are just making minor amendments to it. Unless the club is very small, this is not an efficient way to add all your members - it is far more efficient to import them.

### 5.4.2. Import from the Masterpoint Centre

Here you can import your current list of members from the ABF Masterpoint Centre. Note this will only be your HOME CLUB members as that is all the Masterpoint Centre records. Non home club members will need to be imported or added manually. This is likely to be the most practical option for most clubs.

Click MPC Import.

## Import data from the Masterpoints Centre into My ABF

Membership Type Standard ▼

**IMPORT**

Select the Membership type you wish to import them into (you only need to change the default “Standard” if you have specifically set up some other type that you intend to use).

Click Import and the members will be imported. For a larger club with hundreds of members this can take a little bit of time so please be patient!

### **5.4.3. Import from csv (general, Pianola or Compscore)**

Click CSV Upload. Here you can identify a csv file containing information about your members and import from that into My ABF to create the users.

Use this page to import your member list into My ABF

This can take a little while to process, please be patient.

File Type Generic CSV ▼

Membership Type Standard ▼

**Choose File** | No file chosen

---

### Generic CSV

You can upload any data in our generic CSV format. The file needs to have comma-separated values (CSV) with the following format:

**ABF Number, First Name, Last Name, Email Address, Membership Type**

A header row is expected; you will lose the first row of data if you do not have one.

The email address is optional.

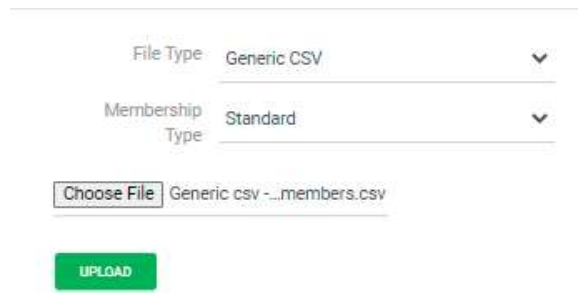
The Membership type is also optional. If specified, it will override the Membership Type chosen on the form. Membership Type must match exactly with the name of a valid Membership Type as defined in Settings.

My ABF supports membership lists exported from Pianola or from Compscore. It is also possible to create your own generic csv file and import that. The instructions on the right of the screen describe the format the generic csv file needs to be in.

Change the File Type setting to select from Generic csv, Compscore or Pianola.

Select the Membership Type to which you wish to import members into. Note if you are importing from a generic csv, you can also import the Membership type. Provided this exactly matches a Member Type already set up for the club, these members will be imported.

Click Choose File to browse to find the source file. Once you have chosen a file a green Upload button will appear:



The screenshot shows a web interface for file upload. At the top, there are two dropdown menus. The first is labeled 'File Type' and has 'Generic CSV' selected. The second is labeled 'Membership Type' and has 'Standard' selected. Below these is a 'Choose File' button and a text input field containing the filename 'Generic csv -...members.csv'. At the bottom of the form is a green button labeled 'UPLOAD'.

Click Upload to import the data. Once again for a larger club with hundreds of members this can take a little bit of time so please be patient!

You will receive an error report where the file contains:

- Invalid ABF numbers
- Duplicate records

Members with inactive ABF numbers will be imported but clearly those members should be reminded that they are not currently recorded by the ABF Masterpoint Centre as having a Home club and this should be rectified.

## 5.5. How does this connect to the Masterpoint Centre member records?

It doesn't. Although My ABF can access the Masterpoint Centre database and import data from it, it remains separate and the two systems will run in parallel for quite a while. The masterpoint centre records will remain the "source of truth" for the purpose of identifying each club's home club members (which is what is used to calculate ABF capitation fees).

At this stage there is no reference to "Home club" membership in My ABF because all My ABF is seeking to obtain is a list of your club's actual members. It doesn't yet care about whether someone is a Home Club member or not.

In future this will be another parameter included in My ABF and it will then be used to calculate capitation fees as well. But for the March 2023 year, clubs will still need to process their annual cancellations of home club members in the masterpoint system as usual.

Later in 2023 it is planned that the Masterpoint Centre functions will be rolled into My ABF and this release is an early phase in the process to enable that.



## 5.6. List of Members

After you have added some members to your club they will appear in the default “List” view:

Members

LIST ADD SEARCH REPORTS

Fantasy Bridge Club has 7 Members

First Name ↓	Last Name	ABF Number	Membership	Status	Action
Carol Unreg	McMurray	289698	Youth	Unregistered User	INVITE TO MY ABF
Christine	Gibbons	636101	Standard	Unregistered User	INVITE TO MY ABF
Example	Member	620254	Standard	Unregistered User	INVITE TO MY ABF
Fiona	Freckle	105	Standard	My ABF User	VIEW PROFILE

The list shows name, ABF number, Membership type, Status (My ABF user or Unregistered user) and allows you to view the profile of an existing My ABF user or invite an Unregistered user to join.

This list can be sorted by clicking on any of the column headings. An up or down arrow symbol is shown by the column where the sort is currently applied. If, after editing a member, you return to this page by clicking “List” your previously selected sort will NOT be retained. If, after editing a member, you return using the back button then your previously selected sort WILL be retained.

There is a search option at the top right.

If you have member editing rights, you will be able to click on the member name and edit the records – as described in 5.9 below.

## 5.7. Inviting Unregistered members to join My ABF

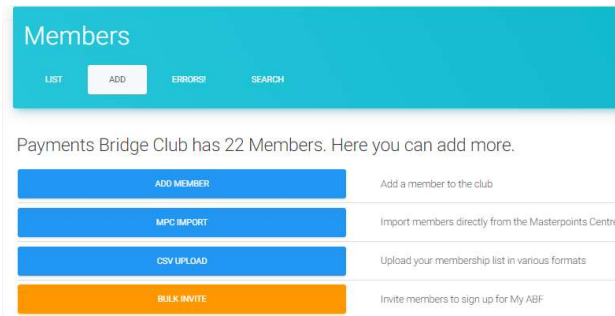
Clubs are encouraged to invite all their members to join My ABF. Having a registered My ABF account enables them to participate in bridge much more easily, including entering and paying for both events and club sessions. It also gives them control over managing their personal information like email addresses (clubs have to maintain that for unregistered members).

There are two ways to invite unregistered members to join My ABF – as part of a bulk invite, or individually.

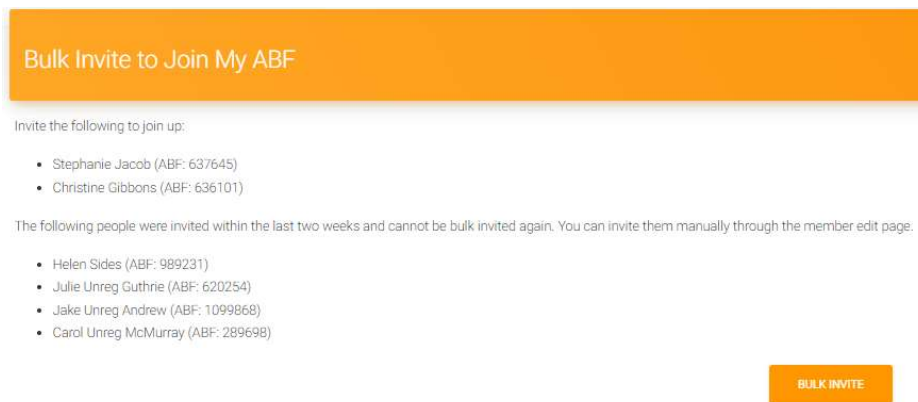
*[Note at this stage the system does not tell you if it cannot deliver the messages – e.g. if the user has no email address or a non-operational email address. Nor can you see the outgoing invites in the Communications section. This is something we will look into.]*

### 5.7.1. Bulk invite

It is possible to send an invite to all unregistered members inviting them to join My ABF. This is done from the Add member screen.



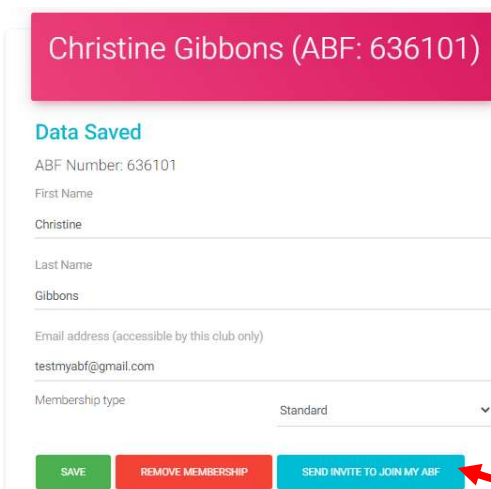
Once you have used this function for a player you cannot invite them again via a bulk invite for two weeks. The system presents a list of all the unregistered members that can receive the bulk invite and those who can't (you can still invite them individually).



The bulk invite button will then send the email to all those unregistered users (provided they have valid email addresses recorded in their member record).

### 5.7.2. Individual invite

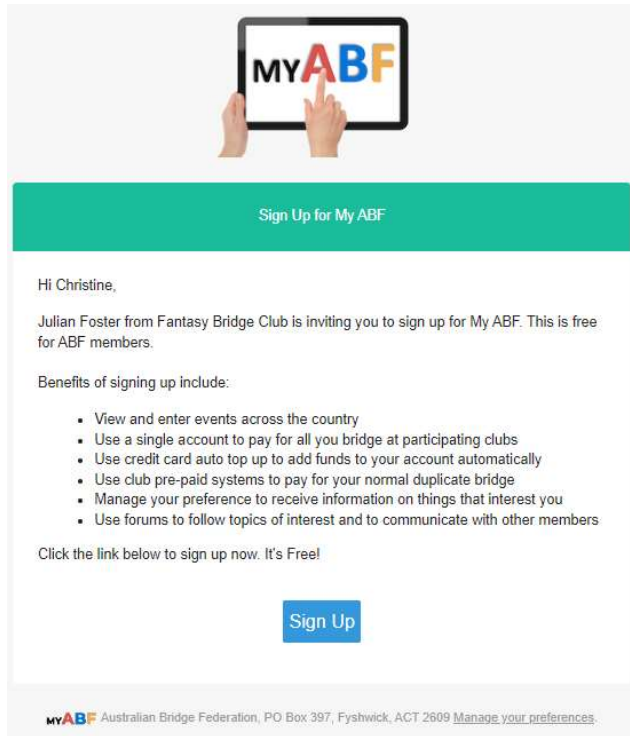
You can also open an individual unregistered user's record and individually send them an invite:



Click the Send Invite To Join My ABF button.

### 5.7.3. The email invite for an Unregistered user

The email sent to unregistered members looks like this:



When the user clicks the Sign Up button they will be presented with the Sign-Up screen pre-filled with their name, ABF number and email address. All they have to do is create a password and confirm it (although they can edit the email address if they want to register with a different one):

The image shows a screenshot of the 'My ABF' sign-up screen. At the top, there is a purple header with the text 'My ABF' and a small icon of a person. Below this is a white box with the text 'Sign Up. It's free for members!'. The main form area is white and contains the following fields: '636101' (pre-filled), 'Christine' (pre-filled), 'Gibbons' (pre-filled), 'testmyabf@gmail.com' (pre-filled), 'Create Your Password', and 'Confirm Your Password'. At the bottom, there is a blue 'SIGN UP' button and a link that says 'Already signed up? Log In.'.

## 5.8. Members' contact email address

An important aspect to maintaining member records is their contact information. The way this is handled in My ABF varies depending on whether the user is registered or not:

1	Registered My ABF user	These users already maintain their own personal details which includes an email address in their My ABF profile. You communicate with them using that email address.
2	Unregistered My ABF user	<p>These users do not have their own My ABF profile.</p> <p>When they are first created in My ABF an email address can be set up for them by the club adding them. This is only visible to that club.</p> <p>If member records are imported from the Masterpoint centre any existing email address recorded for the player is imported. <u>Be aware, however, that these records have not typically been well maintained or used in the past. Any email address for a player coming from the Masterpoint Centre system should therefore be reviewed both to check it's a valid email format to start with and that it is up to date for the member in question.</u></p> <p>If member records are imported from Pianola, Compscore or a generic csv any email address is also imported. These are more likely to be valid as they have probably been actively used by those systems.</p>

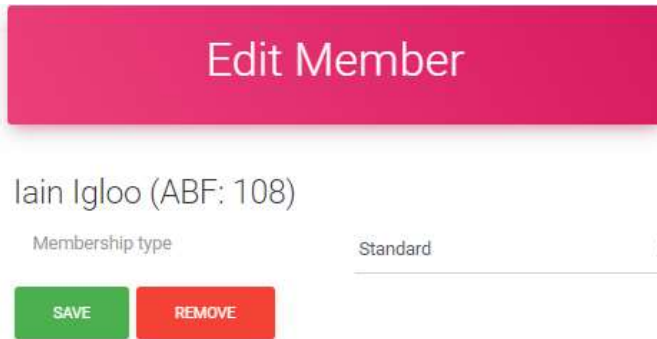
These email addresses are used by the Communications area when emails are sent to members – see 0 below).

## 5.9. Editing Member records – basic details

Where the user has edit permission for members it is possible to open a member's record. Which basic details can be edited depend on whether the user is a registered My ABF user or not.

### 5.9.1. Registered user

A Registered user will not show a great deal here because all the personal details are under the control of the user themselves within their My ABF profile.



Edit Member

Iain Igloo (ABF: 108)

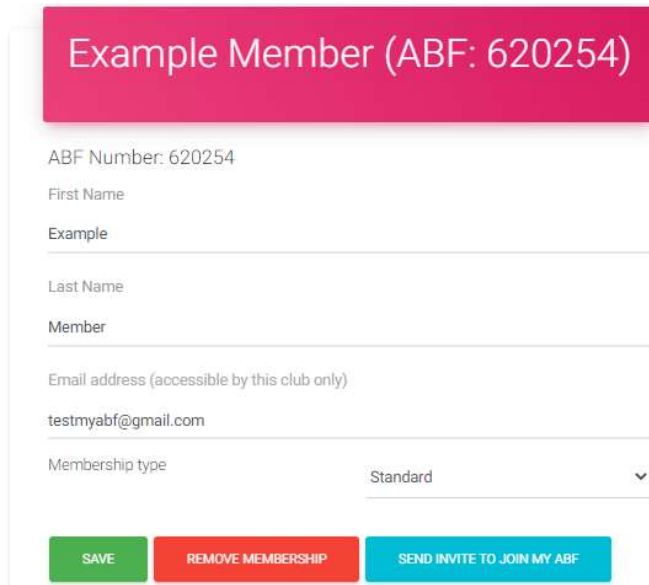
Membership type Standard

SAVE REMOVE

It is possible to change the Membership Type and remove the membership but that's all.

### 5.9.2. Unregistered user

An Unregistered user will show more because it also includes the personal details which are under the control of the club:



Example Member (ABF: 620254)

ABF Number: 620254

First Name  
Example

Last Name  
Member

Email address (accessible by this club only)  
testmyabf@gmail.com

Membership type Standard

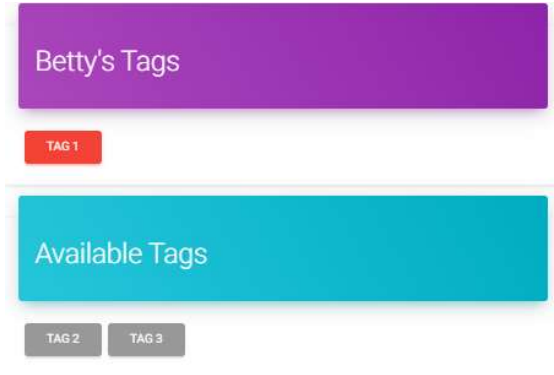
SAVE REMOVE MEMBERSHIP SEND INVITE TO JOIN MY ABF

It is possible to edit the name, the email address, and the membership type.

It is also possible to remove the membership and to individually send an email invite to the member to register for My ABF (this can also be done in bulk from the Add screen).

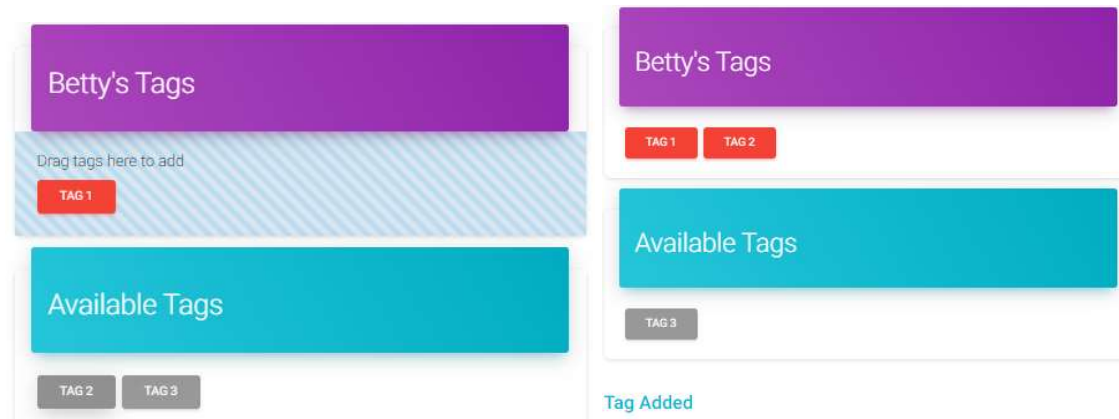
## 5.10. Editing Member records - Tags

It is possible to add tags to the member's record (i.e. identify them to be included in a mailing list for a particular type of communication you might wish to send). Tags are created in the Settings area (see section 12.4.1 below).



All available tags are shown at the bottom and can be dragged & dropped in and out for this member.

Click a Tag and start to drag it – the screen will indicate where you should drop it:



This is the same for Registered and Unregistered users.

## 5.11. Editing Member records - Emails

Any recent emails sent to that user's email address will be displayed and can be viewed.

### Recent Emails

19-Aug-22 12:08pm	Event Entry Cancelled - ABF Mid Year Congress - Pairs	sent
19-Aug-22 12:08pm	Event Entry Cancelled - ABF Mid Year Congress - Pairs	sent
19-Aug-22 12:08pm	Event Entry Cancelled - ABF Mid Year Congress - Pairs	sent

This is the same for Registered and Unregistered users.

## 5.12. Editing Member records – Transactions

This is only relevant for members who are Registered users. A Registered member has a Bridge Credits account and it is possible for administrators with the requisite access to add transactions to that account.

The screenshot displays the 'Transactions' interface. At the top, there is a purple header with the title 'Transactions'. Below this is a table with three columns: 'Date', 'Description', and 'Amount (\$)'. The table contains two entries:

Date	Description	Amount (\$)
18-Aug-22 12:49am	Pay myself	14.00
17-Aug-22 5:14pm	Charge	-5.00

Below the table, there are two transaction entry forms. The first form has an orange header and is titled 'Charge Julian'. It shows 'Balance: \$509.00' and 'Auto Top Up is: Off'. Below the header is a form with two input fields: 'Description' and 'Amount'. A green 'CHARGE' button is positioned below the input fields. The second form has a green header and is titled 'Pay Julian'. It shows 'Club Balance: \$135.00'. Below the header is a form with two input fields: 'Description' and 'Amount'. A green 'PAY' button is positioned below the input fields.

It is possible to either charge or pay into a member's bridge credits account. Enter a description and an amount to activate the Charge or Pay buttons. The other side of the entry goes through the club's bridge credits account.

### ***5.12.1. Charge a member's account***

This would most commonly be a correction or sundry adjustment after a session charge. Such a charge is only possible if the member has a sufficient bridge credits balance.

### ***5.12.2. Pay a member's account***

This could also be a sundry adjustment after a session charge or it could also be a top up of the player's account (perhaps if the player paid money to the club). Such a payment is only possible if the club has a sufficient bridge credits balance.

To access these transactions the user needs to have the following access rights for the club:

- Ability to edit member records; and
- Either: Director access or Payments edit access

See section 0 below on Access for more details on managing these access rights.

Email notifications are sent to the member when these transactions occur.



## 6. Sessions (separate user guide available)



This is where directors or club administrators can start club sessions, import player names from the scoring software, perform a financial reconciliation for the session and initiate bridge credits charges for that session through players accounts (where they have opted for that payment method).

It can dramatically reduce the amount of cash (or individual EFTPOS receipts, vouchers, tokens, etc) a club needs to handle which makes the session reconciliation a lot easier.

It is also very convenient for players who can just have their sessions charged to their bridge credits account (which they can top up manually or have it done automatically). They can turn up and play and no longer have to remember to bring vouchers or cash, etc.

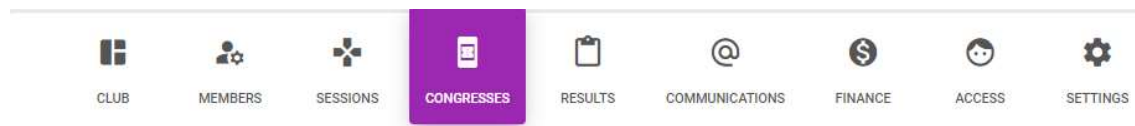
To be able to use this area a club needs to set up assorted things first:

- Create their membership types
- Create their payment types
- Create any miscellaneous categories of income they want to track
- Create their session types and assign \$ rates to them
- Import their members and update the list to be current

The information set up here is what enables the system to calculate table fees for the players in the session (i.e. identify if they are members, visitors or those in a special category where different fees apply). All amounts are manually adjustable by the director or club administration.

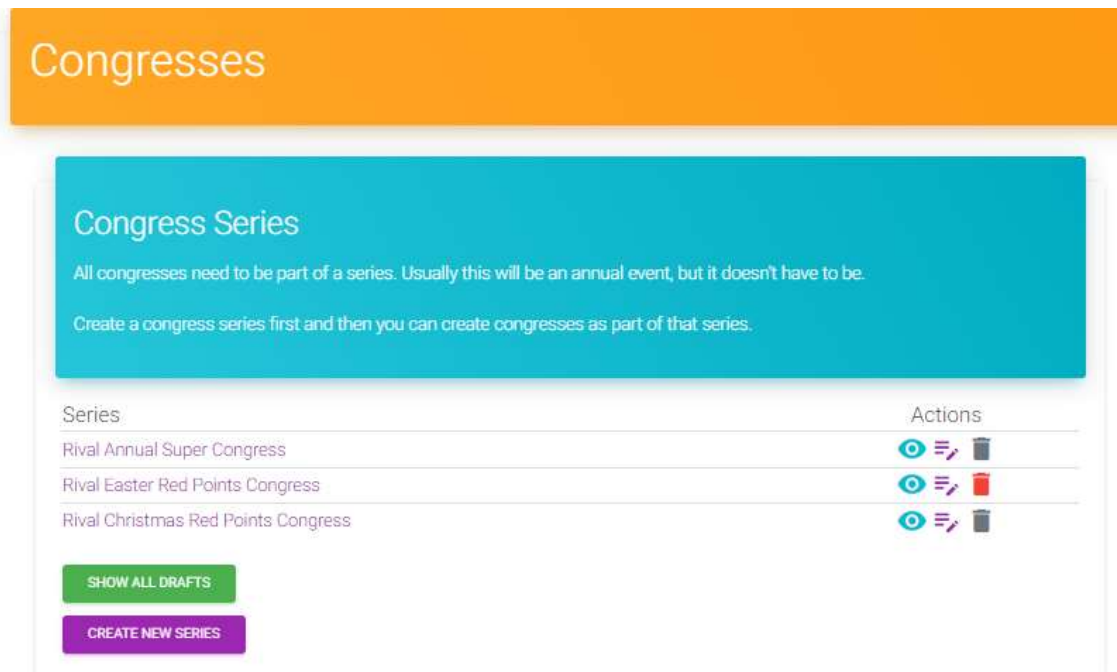
A separate user guide is available for this area.

## 7. Congresses (separate Tournament Organiser Guide available)



Each bridge congress “belongs” to a bridge organisation. This is where an Organisation can manage the ones it has.

### 7.1. Congress “Series”



Every Congress must be part of a “Series”. This allows several congresses to be associated together – usually each annual running of the same event (although it can be any frequency you want).

Although Series have a name, this is just a system placeholder and is visible only to Administration staff. Each individual congress within that series can be named whatever you want (but of course a lot of the time they will just be the same name as the underlying series).

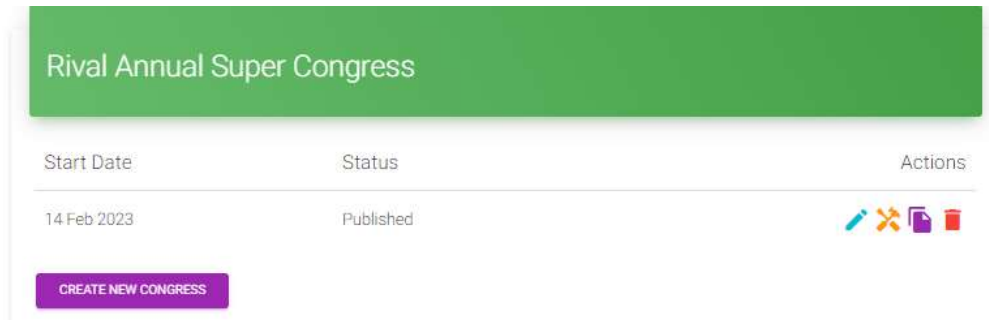
Anyone with Congress administration rights for the organisation (covered in the Access section) can set up a Congress within an existing series. This page is where those series themselves can be set up and managed. Up to now, it has only been possible to set up a new series by requesting it from Julian Foster.

It is STRONGLY RECOMMENDED that each separate major Congress you run is kept in a different series. While it’s possible to just “copy” an existing congress and use it as a template for a new one all within the same series this could create confusion in the future if you want to report on previous editions of the same event. Keeping them as separate series is a lot cleaner.

Within this area you can view the series, rename the series and delete the series (but only if there are no active congresses within it).





## 7.2. Viewing the series

After creating a new series, you can view the series and add/manage congresses within it:



This list shows both Draft and Published congresses. Create a new congress from scratch starts a brand new congress within the series which is typically what you'd do in the first year of a Congress.

Once a congress already exists, it can be managed from here. The icons shown are:

	EDIT	Edit the congress (same as the Edit button on the Congress listing)
	MANAGE	Manage the congress (same as the Manage button on the Congress listing)
	COPY	Copy the congress (usually to roll it over to the following year's running of the event).
	DELETE	Delete the congress (but this is only possible if there are no entries and no events in it. So, in practice, it's only empty shells of congresses that can be immediately deleted).

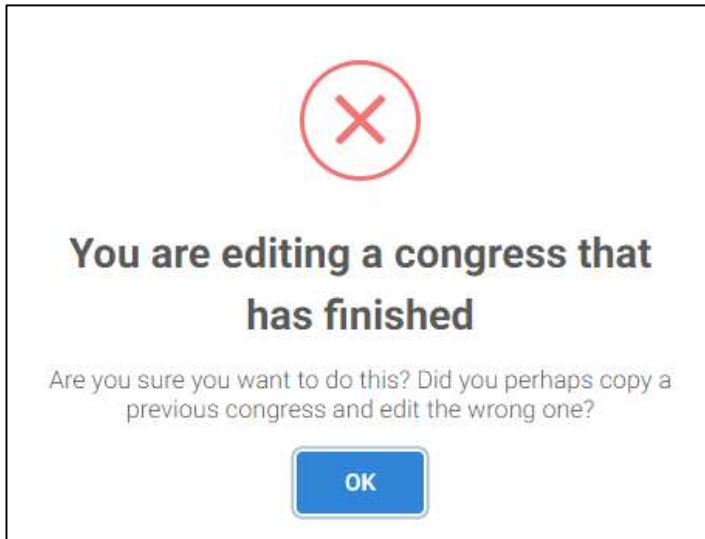
After rolling a congress forward the Start Date is incremented by a year (you may of course need to edit this slightly) and the status of the new congress is set to Draft:



Having rolled forward, to work in the new congress, click the Edit icon against the new Draft to continue to update it for the new year. When ready, the new congress can be published.

### 7.3. Editing a congress









If you attempt to edit a congress that has already finished you will be presented with a warning message on screen since, whilst not impossible, this is unlikely to be a valid action:



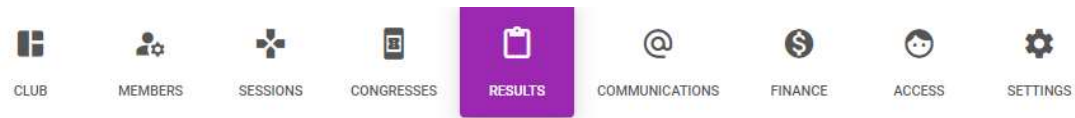
### 7.4. Viewing all drafts

If your organisation has multiple series and several draft congresses amongst them, it is possible to list all drafts using the "Show All Drafts" button.

This will show all congresses with a Draft status, the series they are part of, and the start date. You can then access the Edit, Manage, Copy and Delete functions as normal.

All Draft Congresses		
Series	Start Date	Actions
Rival Annual Super Congress	14 Feb 2024	   
Rival Christmas Red Points Congress	14 Feb 2024	   

## 8. Results

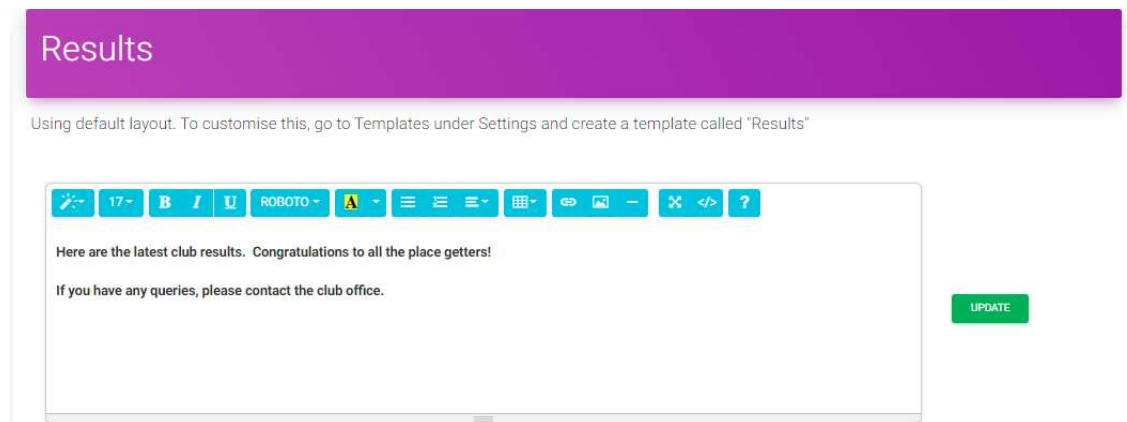


This section is where clubs can upload results from sessions. This in turn will allow players to view their results within My ABF. At this stage it covers duplicate pairs sessions only. It will later be extended to other event formats (swiss pairs, teams, etc). The process involves importing a results file (an xml file in a special format called USEBIO) from a scoring program and then publishing it.

My ABF generates an email to be sent to players when the results are published. It is possible, however, to disable the sending of results emails if you wish (for example you might already be emailing players with results via Pianola so you may not want them to get two emails even though you do want them to be able to see their results in their My ABF dashboards). Results emails can be disabled through the Settings area – see 0 below.

### 8.1. Club - Email template for sending results to players

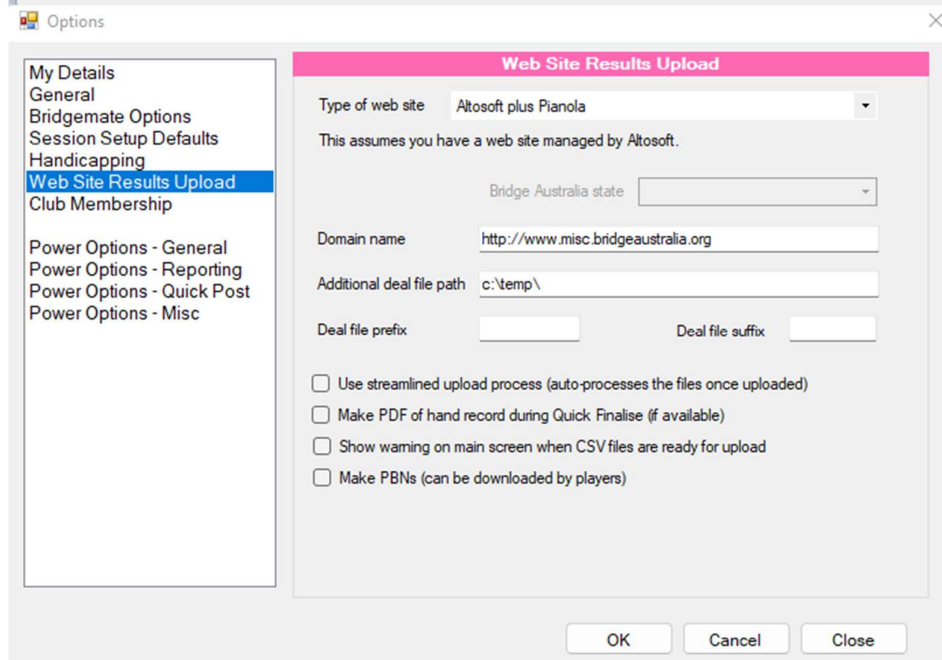
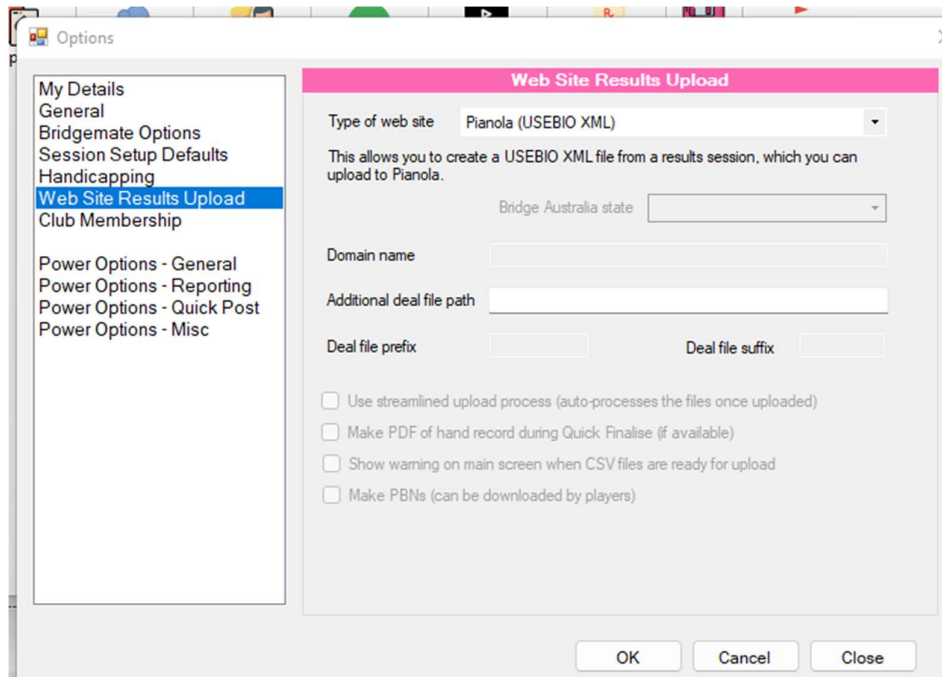
The first part of the screen allows you to create an email that will be sent to players. Format your message and click Update to save it. You can also create a specific template for results to customise the way the email is presented – see section 12.4.2 below for more information about templates.



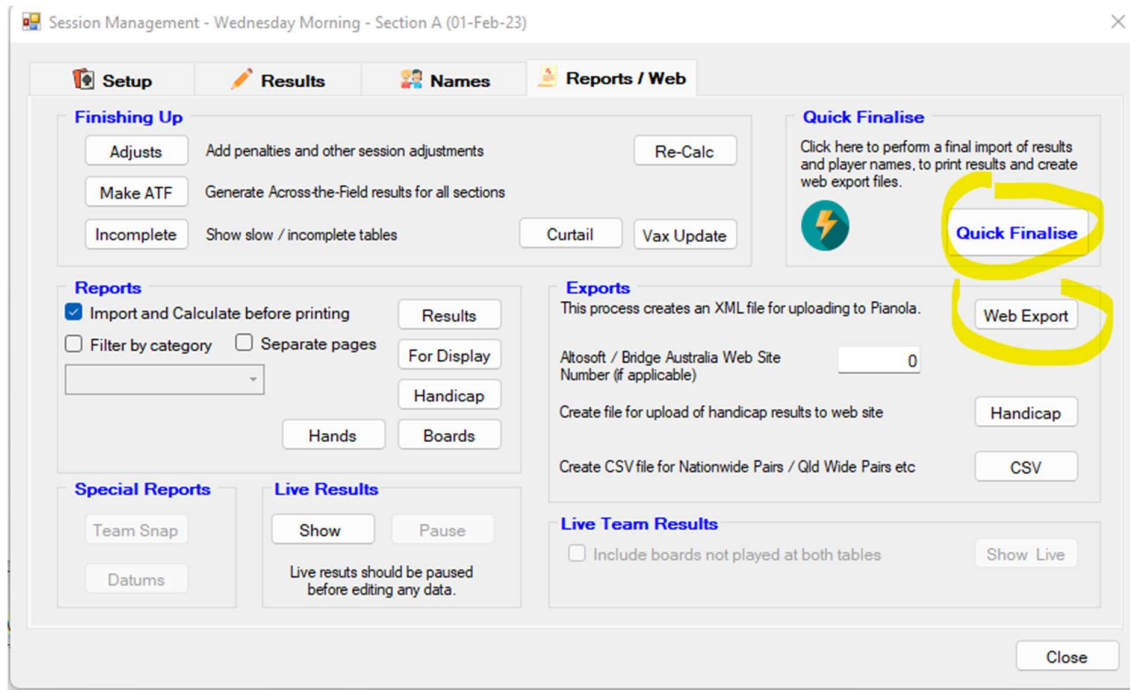
### 8.2. Club - Obtain results file from Compscore or other scoring program

If you are using Compscore these are the instructions for obtaining the results file. If you are using other scoring programs, you may also be able to obtain a similar file but may need to enquire of the provide exactly how to do that.

Within Compscore go to: Setup | Options | Website Options , choose either "Pianola", or "Altosoft plus Pianola" if also exporting to a Compscore web site.

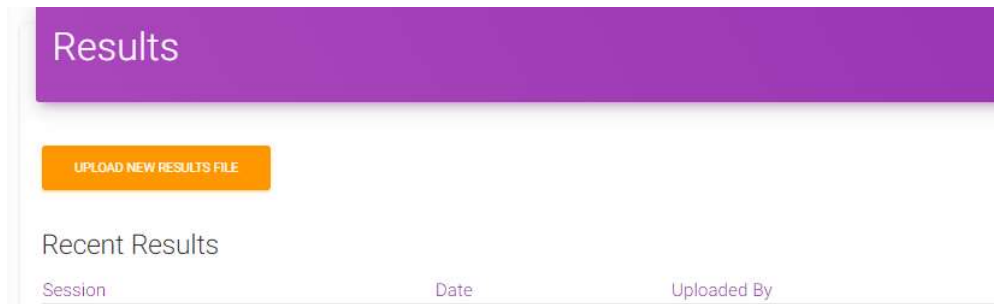


When you have completed the session and are ready to export results go to Reports / Web and click either Web Export or Quick Finalise to create the export files (XML files are stored in C:\Compscore3\Web\XML Files).



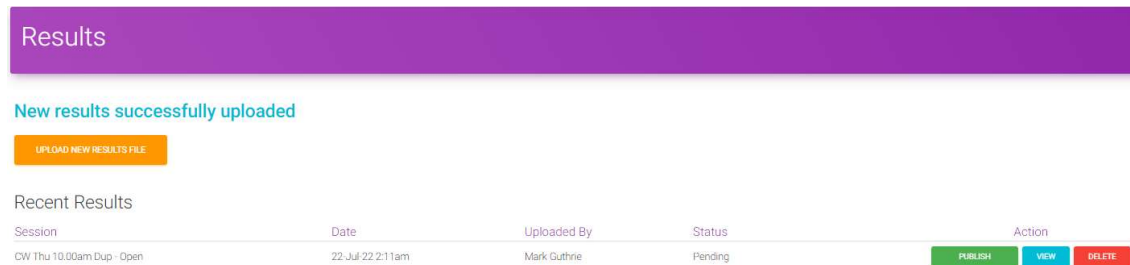
### 8.3. Club - Upload results file into My ABF & publish

To upload results click Upload New Results File:



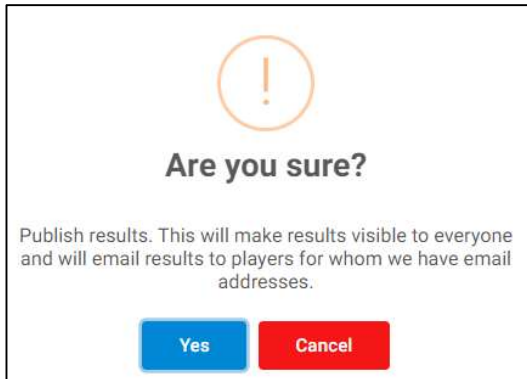
Browse for the results file (the xml file in USEBIO format – as exported from the scoring program).

After upload you will see the file in a draft mode:



You can view the results yourself using the View button. But they will not yet be visible to players.

To make them available, click Publish. You will see a confirmation message:



Click Yes to make the results public and email players who have nominated to receive such emails.

## 8.4. Player – Where to find results

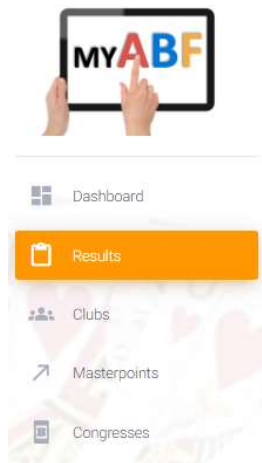
My ABF users within the file who are logged in will now be able to see personalised results. There are two places they can find them.

### 8.4.1. On their dashboard:

Date	Partner/Team	Event	Result
29 May 2019	Eve	CW Wed 2:00pm Rookie	21st
30 May 2019	Linda	CW Thu 10:00am Dup - Open	11th

This lists their most recent results. Clicking on a row directly opens that session's results – see details at 8.5 below.

### 8.4.2. Via their results page in the main menu





That opens a page which includes:

- their recent results (the ones also on their dashboard)
- their team-mates' recent results (if they have defined any teammates in their profile page)
- results from their club(s) (i.e. including sessions they may not have played in themselves)
- all results uploaded by all clubs in My ABF

**Results**

### Your Recent Results

Date	Partner/Team	Event	Club	Place
Thursday 30th May 2019	Linda Aubusson	CW Thu 10.00am Dup - Open	Payments Bridge Club	11th (48.84%)

### Your Teammate's Recent Results

You can add and remove Teammates from [YOUR PROFILE](#)

No results found

### Your Club(s) Recent Results

Date	Event	Club
Thursday 30th May 2019	CW Thu 10.00am Dup - Open	Payments Bridge Club

### All Clubs Recent Results

Date	Event	Club
Thursday 30th May 2019	CW Thu 10.00am Dup - Open	Payments Bridge Club

Clicking on a row directly opens that session's results – see details at 8.5 below.

## 8.5. Player – Results content

Session results will open with a ranking list. If the user played in the session their own result is highlighted:

CW Thu 10.00am Dup - Open			
Rival Bridge Club			
30/05/2019			
Directed by Angie			
North-South			
Place	Players	Score	Green Masterpoints
1	Berri Folkard & Helen Lowry	58.10%	0.51
2	Sally Zylberberg & Lee Santow	56.37%	0.36
3	Yogi Yoga & Zara Zed	56.02%	0.26
4	Graham McMahon & Peter Jonker	55.32%	0.17
5	Sally Simon & Di Moritz	54.63%	0.13
6	Jake Lin & Kevin Wu	54.40%	0.10
6	Fran Campbell & Joyce Edwards	54.40%	0.10
8	Monika Nilsson & Margie Hullah	52.78%	0.07
9	Mary Atkinson & Janis Grauds	52.55%	
10	Sandy Kaplan & Jenny Narunsky	48.96%	
11	Lucy Likeable & Linda Aabusson	48.84%	
12	Dianne Simpson & Patricia Sweeney	48.61%	
13	Roslyn Hunyor & Trish Harrison	45.83%	
14	Henny Theeboom & Alice Sternhell	42.71%	
15	Richard Kuipers & Peter Koorey	40.86%	
16	Shirley Gill & Joan Castle	40.39%	
17	William & Jill Eyre	39.24%	

It is then possible to click through to personal score sheets, individual boards, etc in the usual fashion.

Julian Foster & Linda Aabusson							
Pair 4NS (11th with 48.84%)							
Board	Opponent	Contract	Declarer	Lead	Tricks	Score	Percentage
1	Gwen Cordingley & Jill Harrison	3♥	N	5♦	7	100	53% =
2	Gwen Cordingley & Jill Harrison	4♣	N	3♣	11	650	66% ☆
3	Gwen Cordingley & Jill Harrison	1NT	N	8♦	8	120	100% ☆
4	Narelle Clark & Jann Cathels	4♣	E	8♣	11	650	44% =
5	Narelle Clark & Jann Cathels	2♣	E	A♥	7	50	13% =
6	Narelle Clark & Jann Cathels	2♥	W	2♦	10	-170	16% ✖
7	Beverley Callaway & Yolande Schneider	4♥	N	2♣	10	620	63% ☆
8	Beverley Callaway & Yolande Schneider	5♥	W	K♦	11	450	28% ▼

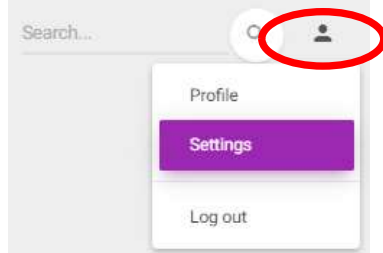
Traveller for Board 1							
		Contract	Declarer	Lead	Tricks	Score	Percentage
North-South	East-West	3♥	W	Q♣	6	150	32.0 100% ☆
Par Contract: 2C by NS or 1N by S for 90							
Henny Theeboom & Alice Sternhell	Beverley Callaway & Yolande Schneider	3♥	N	A♦	8	-50	28.0 88% ✓
Berri Folkard & Helen Lowry	Rosalind Hayden & Vivienne Kissane	3♥	N	7♦	8	-50	28.0 88% ✓
Fran Campbell & Joyce Edwards	Narelle Clark & Jann Cathels	3♥	N	8♦	8	-50	28.0 88% ✓
Shirley Gill & Joan Castle	Roger Watts & Pam Brophy	3♣	S	A♦	7	-100	17.0 53% =
Julian Foster & Linda Aabusson	Gwen Cordingley & Jill Harrison	3♥	N	5♦	7	-100	17.0 53% =
Richard Kuipers & Peter Koorey	Arthur Bragg & Allan Pike	3NT	S	A♦	7	-100	17.0 53% =
John Mottram & Lorraine Schaap	Alicia Mercer & Margarita Beker	3♥	N	8♣	7	-100	17.0 53% =

## 8.6. Player - Control of results email notifications

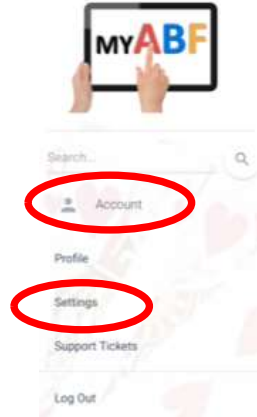
Note that results emails are not related to your club members. They are simply sent to anyone playing in the session for which My ABF has an email address.

Players can, however, opt in or out of receiving results emails. They do this on their Settings page which is opened via:

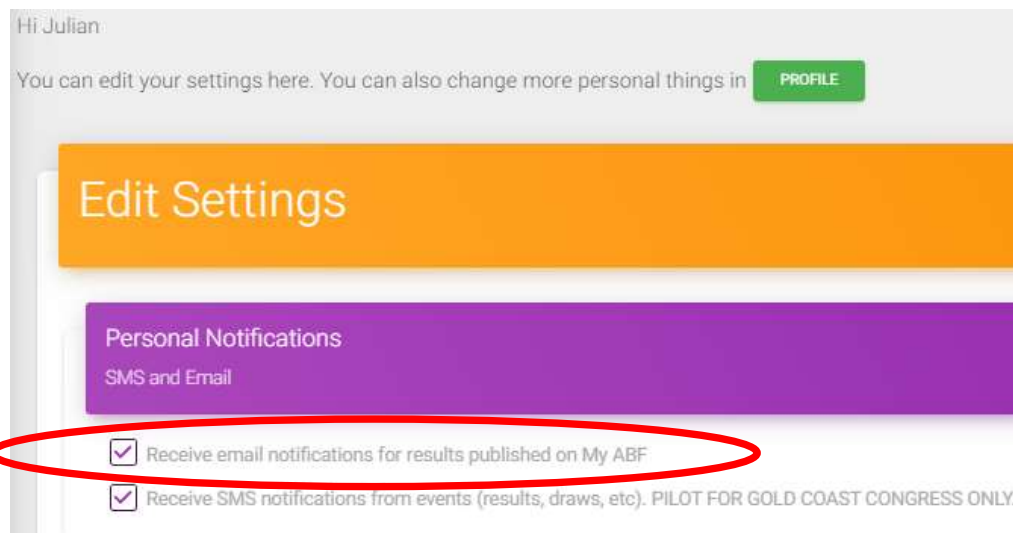
The person icon on a computer:



The Account menu on a tablet/phone:

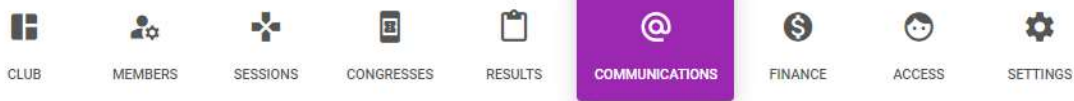


Under Personal Notifications there is a box which players can untick if they do not wish to receive results emails from My ABF.



Unregistered My ABF users do not have this page but they have an ability to unsubscribe from all My ABF emails via the link at the bottom.

## 9. Communications



This section covers how clubs can communicate with their members (primarily by sending emails).

### 9.1. Public information

It is possible to create a simple profile page with information about the club. This will operate in a similar way to the Congress webpage builder. At this stage these pages will only be accessible when the club name appears in a search or in a member's profile. They will not be used for anything else but in future they may become the basis for a club to have a more complete webpage within My ABF.



### Public Information

Here you can build a page that your members and others will see when they look up your club on My ABF.

Use the editor below to add text, images and links to your Public Profile.



## 9.2. Email – managing email addresses

The email area allows clubs to send email to their members, or groups of their members.

For ease of reference the section from 5.8 above discussing email addresses is repeated here.

1	Registered My ABF user	These users already maintain their own personal details which includes an email address in their My ABF profile. You communicate with them using that email address.
2	Unregistered My ABF user	<p>These users do not have their own My ABF profile.</p> <p>When they are first created in My ABF an email address can be set up for them by the club adding them. This is only visible to that club.</p> <p>If member records are imported from the Masterpoint centre any existing email address recorded for the player is imported. <u>Be aware, however, that these records have not typically been well maintained or used in the past. Any email address for a player coming from the Masterpoint Centre system should therefore be reviewed both to check it's a valid email format to start with and that it is up to date for the member in question.</u></p> <p>If member records are imported from Pianola, Compscore or a generic csv any email address is also imported. These are more likely to be valid as they have probably been actively used by those systems.</p>

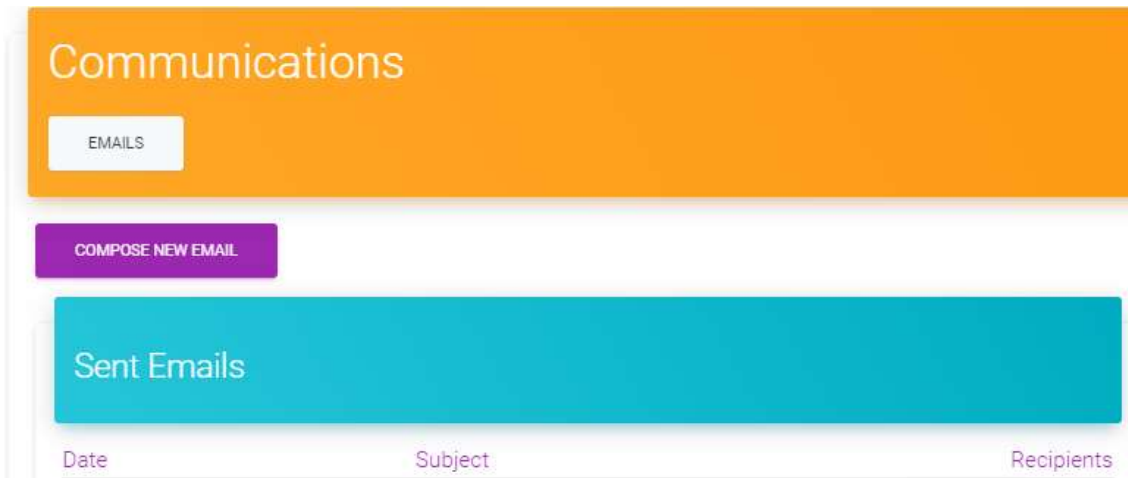
## 9.3. Email – sending emails

This is where email communications to members is managed. Functionality includes:

- Ability to apply tags to members to create various mail groups
- Ability to create and use email templates
- Ability to send emails to groups of members with the selected tags
- Ability to view basic statistics for a mailout (number of bounces, number of read emails, etc)

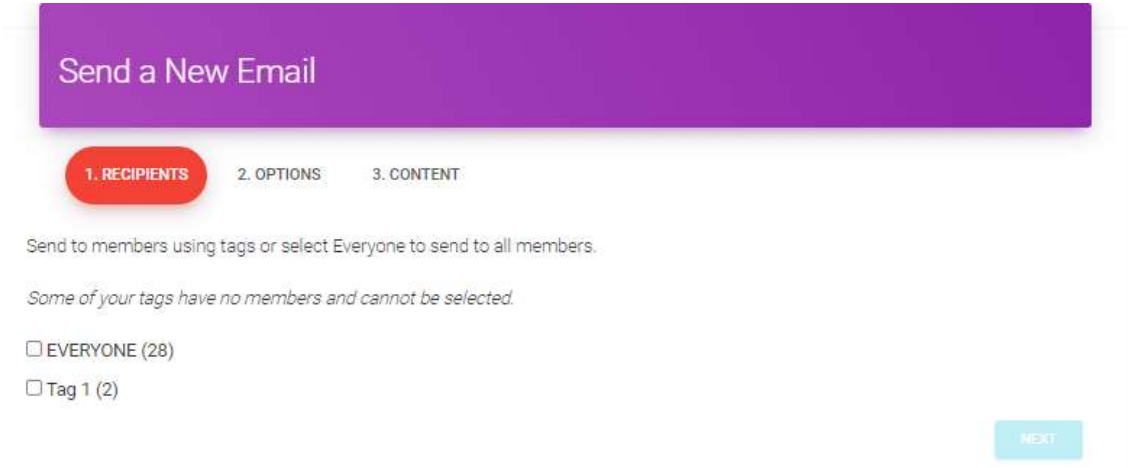
Tags and templates are created in the Settings area (see section 12.4 below). They are then used in this area.

Tags and templates are both optional but note that without tags emails will be directed to all your club members by default.



Click Compose New Email to create and send an email. There is then a 3 step process to go through:

### 9.3.1. Recipients

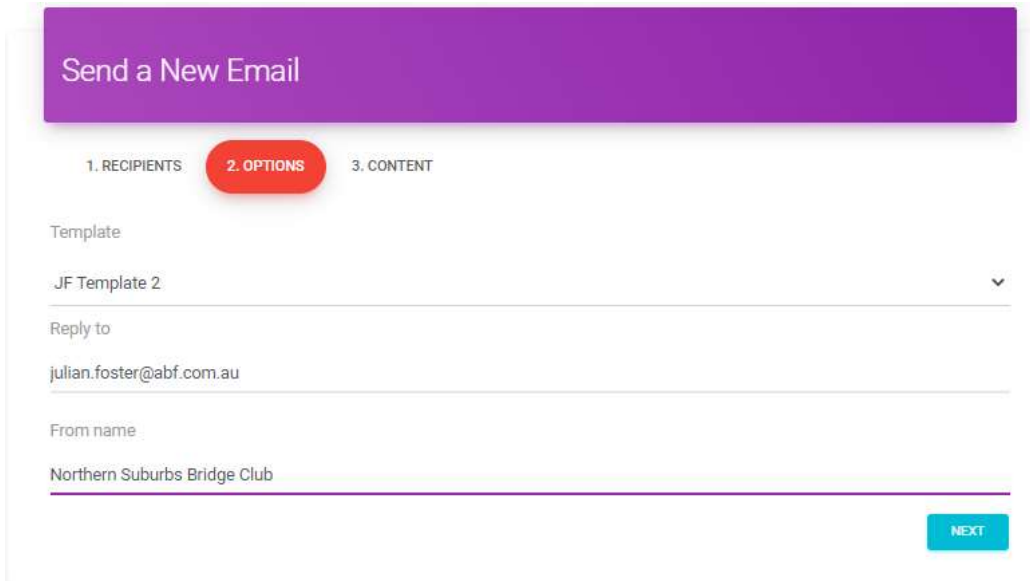


If you have not set any tags up, the message will default to being sent to all your members.

If you have set some tags up, you can select them here. That will select the group(s) of members who have those tags. You can view the Recipients that have been selected by these tags.

**NOTE:** We will be adding future functionality to allow the list of recipients to be manually edited.

### 9.3.2. Options

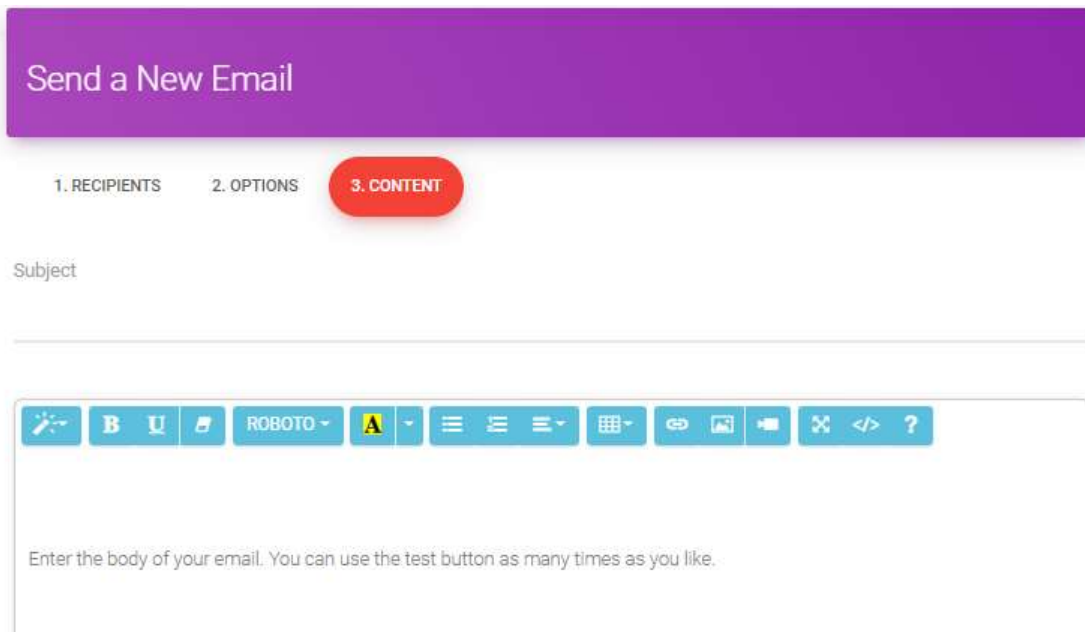


The screenshot shows a purple header with the text "Send a New Email". Below the header, there are three steps: "1. RECIPIENTS", "2. OPTIONS" (highlighted in a red circle), and "3. CONTENT". The "Options" section includes a "Template" dropdown menu with "JF Template 2" selected, a "Reply to" field with "julian.foster@abf.com.au", and a "From name" field with "Northern Suburbs Bridge Club". A blue "NEXT" button is located at the bottom right of the form.

Select the email template to be used (a default one exists to start with), the reply to address and the name the email will come from.

If you set up your own template, you can include the Reply to and From name within that. Those will then be presented here automatically. If you do not set up your own template you will need to add this information each time you compose an email.

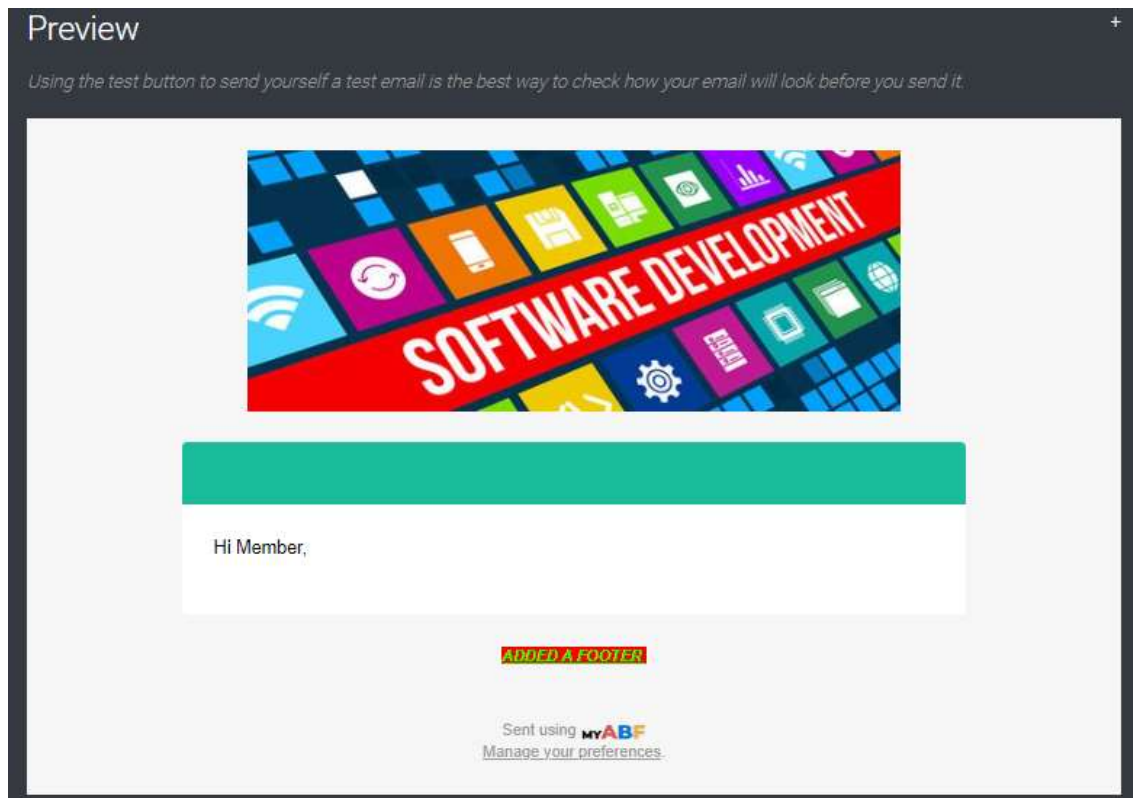
### 9.3.3. Content



The screenshot shows a purple header with the text "Send a New Email". Below the header, there are three steps: "1. RECIPIENTS", "2. OPTIONS", and "3. CONTENT" (highlighted in a red circle). The "Content" section includes a "Subject" field and a rich text editor. The rich text editor has a blue control bar with icons for undo, bold, italic, strikethrough, font color, background color, bulleted list, numbered list, link, unlink, insert image, and help. Below the control bar, there is a text area with the placeholder text "Enter the body of your email. You can use the test button as many times as you like."

Add the Subject and the body text for the email (which can be formatted using the blue control bar).

On the right of the screen you will see a live preview of your email as you are creating it. This uses the template that was selected at step 2.



You can also add attachments and send a test email to yourself before sending the email “live”.

You can easily switch back to the Recipients section at any time to see who the email will be sent to.

It is also possible to open multiple My ABF browser tabs so that you can keep an email in a draft state in one tab, while fixing up other things elsewhere.

#### 9.4. Reviewing sent emails

A list is kept of emails sent out.

Date	Subject	Recipients
Friday 10th Jun 2022 8:25am	2nd test	<a href="#">VIEW</a> 2
Friday 10th Jun 2022 8:14am	Test email from LM BC	<a href="#">VIEW</a> 2



Clicking on View will bring up more details about the email:

Sent by: Julian Foster (Lake Macquarie Bridge Club Inc)

[View first email](#)

#### Email Sending Status

● Sent



#### Post-Send Activities




This shows some basic statistics for the email sent including how many were sent, delivered, opened, clicked and bounced.

Click on View first email to see the first email sent out in this distribution:

This email was sent to 2 people. Showing first email sent.

To: julianrfoster@gmail.com  
Subject: JF test email send out to Tag 1



JF test email send out to Tag 1

Hi Graham,  
Now going to members with tag 1  
Askey - to JF gmail account  
Thomas - to JF yahoo account  
(We hope!)

Sent using myABF  
[Manage your preferences](#)

To save space we don't store the whole email when it has been sent. As a result, images may not be shown.  
To see the full email as it was sent [click here to re-send yourself a copy](#) which will include all content.

Show details

At the very bottom it is possible to click “Show details” to see statistics about this particular email:

## Details

Date Sent: *Wednesday 18th May 2022 1:49am*

Event	Description
Sent	Wednesday 18th May 2022 1:49am
Delivered	Wednesday 18th May 2022 1:49am
Opened	1 time. Last opened: Wednesday 18th May 2022 1:49am
Clicked	0 times. Last clicked: Never

This email was sent to 2 people. [Show recipients](#)

This was sent using a template with variables. [Show variables for this email](#)

This also shows more detail about the delivery of this particular email, who else it went to, and the template used.

## 10. Finance



This is the primary way for a club administrator with financial access to open the club's bridge credits statement.

### 10.1. Bridge credits statement

The screenshot shows the 'Finance' section of the Club Admin interface. At the top, there is a purple header with the word 'Finance' and a 'TRANSACTION' button. Below the header, the 'Club Balance' is \$155.00 and the 'Members' Balance' is \$2,464.66. A dropdown menu labeled 'All Transactions' is open, showing a list of transactions with columns for Date, Description, Who, Amount, and Balance.

Date	Description	Who	Amount	Balance
15-Jun-23 1:27pm	City Monday Morning 20 Feb 23 - 2023-04-19	Betty Bunting (ABF: 101)	\$10.00	\$155.00
15-Jun-23 1:27pm	City Monday Morning 20 Feb 23 - 2023-04-19	Mark Guthrie (ABF: 620246)	\$20.00	\$145.00
15-Jun-23 1:21pm	City Monday Morning 20 Feb 23 - 2023-06-15	Betty Bunting (ABF: 101)	\$10.00	\$125.00
15-Jun-23 1:21pm	City Monday Morning 20 Feb 23 - 2023-06-15	Alan Admin (ABF: 100)	\$10.00	\$115.00
15-Jun-23 1:21pm	City Monday Morning 20 Feb 23 - 2023-06-15	Mark Guthrie (ABF: 620246)	\$20.00	\$105.00
14-Mar-23 4:36pm	EL Tue 1 30pm Rookie 12 Jul 22 - 2023-03-14	Alan Admin (ABF: 100)	\$2.00	\$83.00
14-Mar-23 4:28pm	EL Tue 1 30pm Rookie 12 Jul 22 - 2023-03-14	Alan Admin (ABF: 100)	\$22.00	\$83.00

A summary of the club's balance and most recent transactions is shown. The total bridge credits balance of the club's members is also displayed although a club administrator cannot access an individual member's statement as that is confidential.

Within the header it is possible to transact with members (see next section) or to filter the statement further.

### 10.2. Summarising the statement

Club bridge credit statements can become very long, especially if club session payments are being used where there can be many line items for a single session. When viewing a club's bridge credits statement through the Finance section of the Club Admin menu it is now possible to summarise it.

Under the Club Balance, there is a drop-down selector allowing you to summarise the transactions by Session (relevant to clubs using the system for club session table money payments), by Event (relevant to clubs using the system for congresses) and to display all other types of transaction not associated with a specific session or event (ABF settlements, transfers to players, manual adjustments, etc).



This summarisation is just for immediate convenience when viewing. For more detailed functions (use of date ranges, search and export) use the Filter view.

### 10.2.1. Summary by Session

Summary by Session lists each session individually with the \$ total in a single line:

Club Balance: \$2,566.00

Summary by Session

Date	Session
12-Jun-23 9:53pm	MyABF Monday Night Section A 12 Jun 23 - 2023-06-12
12-Jun-23 4:19pm	MyABF Monday Afternoon Section A 12 Jun 23 - 2023-06-12
10-Jun-23 11:44am	MyABF Saturday Morning Section A 10 Jun 23 - 2023-06-10
9-Jun-23 3:09pm	MyABF Friday Afternoon Section A 9 Jun 23 - 2023-06-09

Click on the line item to expand it to show all the transactions for that Session:

Session Details

OPEN SESSION

Player	Fee
Gabrielle Bastow (ABF: 1033581)	\$7.00
Ian Clark (ABF: 215007)	\$7.00
Robert Kirberger (ABF: 1140051)	\$7.00
David Gallagher (ABF: 156787)	\$7.00
Chris England (ABF: 821330)	\$7.00

Click Open Session to go to the session detail screen.

### 10.2.2. Summary by Event

Summary by Event lists each event with the total \$ for that event in a single line.

Club Balance: \$5,331.00

Members' Balance: \$0.00

Summary by Event

First Payment Date	Congress - Event	Amount
Thursday 29th Jun 2023	Test congress 2025 - Teams	\$100.00
Monday 26th Jun 2023	Test congress 2025 - Pairs	\$64.00

Click on the event name to expand it to show all transactions associated with that event:

All Transactions for Test congress 2025 - Teams

← SHOW ALL				
Date	Description	Who		Amount
29-Jun-23 3:36pm	Teams	David Weston (ABF: 65617)		\$25.00
29-Jun-23 3:36pm	Teams - TBA	Julian Foster (ABF: 518891)		\$25.00
29-Jun-23 3:36pm	Teams - Jenna Gibbons (ABF: 636096)	Julian Foster (ABF: 518891)		\$25.00
29-Jun-23 3:36pm	Teams - Julian Foster (ABF: 518891)	Julian Foster (ABF: 518891)		\$25.00

Click Show All to return to the summarised list.

### 10.3. Filtering the statement

The transactions in a club's bridge credit statement can be filtered in more detail. Click the Filter button to the right of the header. This brings up an area where selections can be made (Click Unfilter to return to the top level view):

Finance

TRANSACT

UNFILTER

Filter Transactions

Date Range: Month to date

Start Date: 31/03/2023

End Date: 29/06/2023

View: All Transactions

SEARCH

CSV DOWNLOAD

EXCEL DOWNLOAD

This provides a number of ways to filter the full statement.

#### 10.3.1. Filter by date range

An initial date range of the last 3 months is provided. There are two ways to amend this.

The Date range selector can be used to choose from some pre-set options:

Date Range

Month to date

Month to date

Year to date

Last Month

Last Year

All

If a custom range is required, select specific Start and End dates using the date selectors:

Start Date

31/03/2023

March 2023

Mo Tu We Th Fr Sa Su

27 28 1 2 3 4 5

6 7 8 9 10 11 12

13 14 15 16 17 18 19

20 21 22 23 24 25 26

27 28 29 30 31 1 2

3 4 5 6 7 8 9

Clear Today

Click the purple Search button to display the transactions within the selected range.

### 10.3.2. Search

A text search field is also available. This search operates across the Description and the Who columns. Key in what you are looking for and the selections will automatically filter to only display transactions including that text.



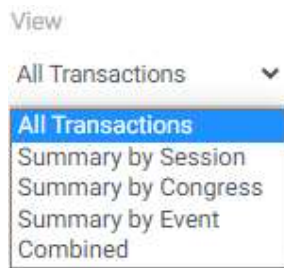
The screenshot shows a search interface with a search field containing the text 'julian'. Below the search field is a table of transactions. The table has columns for Date, Description, Who, Amount, and Balance. There are four rows of transactions, all involving Julian Foster (ABF: 518891) for Pairs. The first row is a refund of -\$50.00 on 27-Jun-23 10:15pm, leaving a balance of \$5,031.00. The second row is a payment of \$50.00 on 26-Jun-23 9:06pm, leaving a balance of \$5,166.00. The third row is a refund of -\$50.00 on 26-Jun-23 9:06pm, leaving a balance of \$5,116.00. The fourth row is a refund of -\$50.00 on 26-Jun-23 9:06pm, leaving a balance of \$5,166.00. There are also buttons for 'SEARCH', 'CSV DOWNLOAD', and 'EXCEL DOWNLOAD'.

Date	Description	Who	Amount	Balance
27-Jun-23 10:15pm	Refund to Julian Foster (ABF: 518891) for Pairs	Julian Foster (ABF: 518891)	-\$50.00	\$5,031.00
26-Jun-23 9:06pm	Pairs - Julian Foster (ABF: 518891)	Julian Foster (ABF: 518891)	\$50.00	\$5,166.00
26-Jun-23 9:06pm	Refund to Julian Foster (ABF: 518891) for Pairs	Julian Foster (ABF: 518891)	-\$50.00	\$5,116.00
26-Jun-23 9:06pm	Refund to Julian Foster (ABF: 518891) for Pairs	Julian Foster (ABF: 518891)	-\$50.00	\$5,166.00

This could be used to search for transactions from a particular person or for a particular event or session.

### 10.3.3. Filter by type of transactions

It is possible to filter the transactions by Session, Congress, Event or Combined.



Note that all of these summaries are only for amounts paid with Bridge Credits. Therefore summaries by Event or Congress will NOT necessarily match the totals in the Congress management area because those include amounts received by ALL payment methods, not just by bridge credits. Reports will be added to the Congress management area in future that fully reconcile income for a congress event, including all discounts and all payment methods.

### 10.3.4. Summary by Session

When summarised by Session, the listing shows each Session within the selected date range and its total:



The screenshot shows a 'Filter Transactions' interface. It has a 'Date Range' section with 'Month to date' selected, a 'Start Date' of 31/03/2023, and an 'End Date' of 29/06/2023. There is a 'View' dropdown menu set to 'Summary by Session'. Below the filters is a table of sessions. The table has columns for Session Date, Session, and Total Amount. There is one row showing a session on 13 Jun 2023 titled 'MyABF Tuesday Morning Section A 13 Jun 23' with a total amount of \$270.00. There are also buttons for 'SEARCH', 'CSV DOWNLOAD', and 'EXCEL DOWNLOAD'.

Session Date	Session	Total Amount
13 Jun 2023	MyABF Tuesday Morning Section A 13 Jun 23	\$270.00

Click on the Session title to go to the session detail page.

### 10.3.5. Summary by Congress

When summarised by Congress, the listing shows each Congress and its Start Date:

Filter Transactions

Date Range: Month to date | Start Date: 31/03/2023 | End Date: 29/06/2023 | View: Summary by Congress

SEARCH | CSV DOWNLOAD | EXCEL DOWNLOAD

View settings do not apply to downloads

Start Date	Congress Name	Total Amount
1 Jan 2025	Test congress 2025	\$164.00

Click on the Congress name to open the list of the Events within that congress:

Filter Transactions

Date Range: Month to date | Start Date: 31/03/2023 | End Date: 29/06/2023 | View: Summary by Congress

SEARCH | CSV DOWNLOAD | EXCEL DOWNLOAD

View settings do not apply to downloads

All Events for Test congress 2025

Date Range is Not Applied to This View

Start Date	Event	Total Payments
Saturday 4th Jan 2025	Teams	\$100.00
Wednesday 1st Jan 2025	Pairs	\$64.00

Click on the Event name to open the list of all bridge credit transactions for that Event:

All Transactions for Test congress 2025 - Teams

Date Range is Not Applied to This View

<< SHOW ALL

Date	Description	Who	Amount
29-Jun-23 3:36pm	Teams	David Weston (ABF: 65617)	\$25.00
29-Jun-23 3:36pm	Teams - TBA	Julian Foster (ABF: 518891)	\$25.00
29-Jun-23 3:36pm	Teams - Jenna Gibbons (ABF: 636096)	Julian Foster (ABF: 518891)	\$25.00
29-Jun-23 3:36pm	Teams - Julian Foster (ABF: 518891)	Julian Foster (ABF: 518891)	\$25.00

(Note that at this detail level the date range is disregarded and all transactions are shown).

Click Show All to return to the summary list.

### Operation of summary display and date range

At the summary level only transactions within the selected date range for the Congress are displayed. Because transactions for congresses can occur over a wide period of time, however, a warning is presented if there are additional transactions outside that date range. Click on that to show the total \$ value of payments made outside the date range chosen.

The screenshot shows the 'Filter Transactions' interface. The 'Date Range' is set to 'Last Month'. The 'Start Date' is 01/05/2023 and the 'End Date' is 28/06/2023. The 'View' is set to 'Summary by Congress'. A 'SEARCH' button is visible. A warning message is displayed: 'Payments of \$200.00 were made outside the selected date range' with a red icon and '\$136.00'.

At the detail level the date range is disregarded and all transactions for the Event are shown.

This issue does not arise for Sessions which always occur on a single day only.

#### 10.3.6. Summary by Event

The Summary by Event view operates very similarly to the Summary by Congress view. The initial view includes the Start Date and Congress name for each Event.

The screenshot shows the 'Filter Transactions' interface. The 'Date Range' is set to 'Month to date'. The 'Start Date' is 31/03/2023 and the 'End Date' is 29/06/2023. The 'View' is set to 'Summary by Event'. A 'SEARCH' button is visible. A table of transactions is shown:

Start Date	Congress Name	Event Name	Total Amount
4 Jan 2025	Test congress 2025	Teams	\$100.00
1 Jan 2025	Test congress 2025	Pairs	\$64.00

Click on the relevant Event name to open the list of all transactions for that event – which then operates as described above.

#### 10.3.7. Combined

The Combined view is colour coded to highlight Event entries, Club session payments and ABF settlement payments separately.

15 Jul-23	Event Entries	Event Entry	NSBC Championship Teams - NSBC Championship Graded Teams Event	\$40.00
13-Jun-23	Session Payments	Club Payment	MyABF Tuesday Morning Section A 13 Jun 23	\$270.00
2 Jun-23 11:27am	ABF	Settlement	Settlement from ABF: Fees 2.00%. Net Bank Transfer: \$15186.57	-\$15,496.50

Transactions outside these categories display with no shaded colour background.

There is no drill-down capability from this view.



## 10.4. CSV and Excel download



[View settings do not apply to downloads](#)

These buttons allow you to download the statement to csv or Excel.

The downloads do include transactions for the selected date range only. They do not take into account any view settings – i.e. they are not limited to purely the summary view or the specific event/congress chosen.

### **10.4.1. CSV download**

The csv download operates the same way as currently but with two changes:

- It only includes transactions in the date range selected.
- It now includes additional columns.
  - The current csv download includes Date, Counterparty, Reference, Type, Description, Amount and Balance.
  - The new csv download includes additional columns for Transaction ID, Session ID, Session Name, Event ID and Event Name. These parameters allow the file to be sorted and analysed more easily (and, in future, will allow more detailed data analysis and congress reports to be provided).

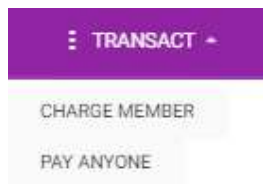
### **10.4.2. Excel download**

The new Excel download generates an Excel spreadsheet with 4 tabs:

- Transactions (a full listing – the same data as the csv download)
- Sessions (a summary view of all sessions)
- Events (a summary view of all events)
- Combined (a combined view showing the Session and Event summaries alongside other individual transactions)

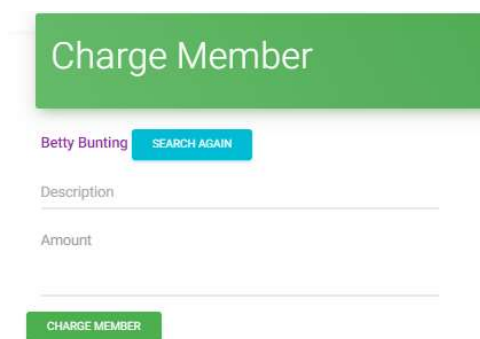
## 10.5. Transactions

Click Transact in the header to charge a member or pay anyone.



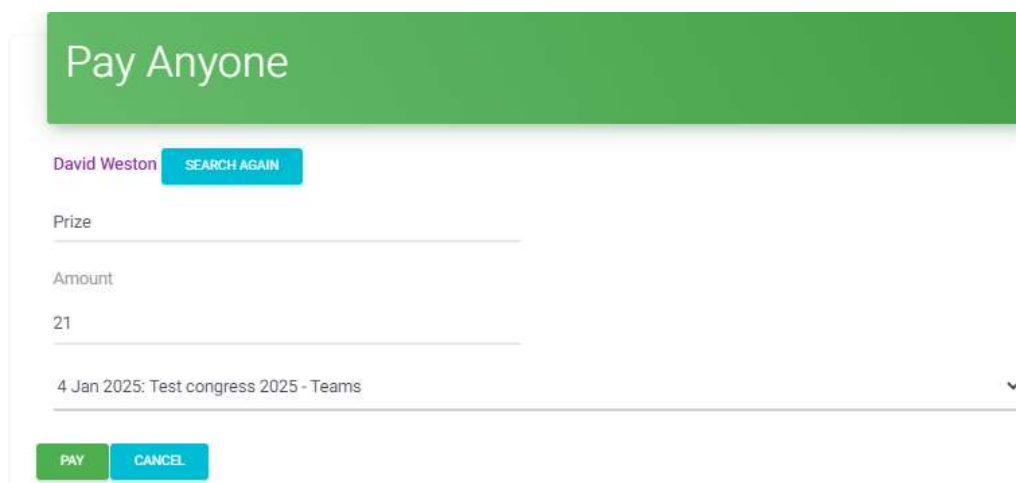
### 10.5.1. Charge Member

To charge a registered member of the club search for the member, add a description and an amount. Click Charge Member. The charge will be applied if the member has sufficient balance. The charge will be visible in the member's statement and an email notification will also be sent.

A screenshot of the 'Charge Member' form. It features a green header with the text 'Charge Member'. Below the header, the name 'Betty Bunting' is displayed next to a 'SEARCH AGAIN' button. There are two input fields: 'Description' and 'Amount'. At the bottom of the form, there is a green button labeled 'CHARGE MEMBER'.

### 10.5.2. Pay Anyone

It is possible to pay any registered user of My ABF. Search for the user, add a description, optionally associate it with a Congress event (see note below) and add an amount.

A screenshot of the 'Pay Anyone' form. It features a green header with the text 'Pay Anyone'. Below the header, the name 'David Weston' is displayed next to a 'SEARCH AGAIN' button. There are three input fields: 'Prize', 'Amount', and a dropdown menu. The 'Amount' field contains the value '21'. The dropdown menu is set to '4 Jan 2025: Test congress 2025 - Teams'. At the bottom of the form, there are two buttons: 'PAY' and 'CANCEL'.

Click Pay. The payment will be made if the club has sufficient balance. The payment will be visible in the user's statement and an email notification will also be sent.

### 10.5.3. Associating the payment with a Congress event

After selecting the player there is an option to associate the transaction with an event. This feature might commonly be used when prizes for an event are being paid in the form of bridge credits for example. The selection is optional – the transaction can be left on its own if preferred.

By selecting an Event from the list, however, this transaction will then be associated with it and will be included in the reporting summaries for it:

The total for the event now takes into account the deduction for the prize:

Filter Transactions

Date Range: Month to date | Start Date: 31/03/2023 | End Date: 29/06/2023 | View: Summary by Event

SEARCH | CSV DOWNLOAD | EXCEL DOWNLOAD

View settings do not apply to downloads

Start Date	Congress Name	Event Name	Total Amount
4 Jan 2025	Test congress 2025	Teams	\$79.00

The expanded list then includes the prize transaction:

#### All Transactions for Test congress 2025 - Teams

Date Range is Not Applied to This View

<< SHOW ALL

Date	Description	Who	Amount
29-Jun-23 6:01pm	Prize	David Weston (ABF: 65617)	-\$21.00
29-Jun-23 3:36pm	Teams	David Weston (ABF: 65617)	\$25.00
29-Jun-23 3:36pm	Teams - TBA	Julian Foster (ABF: 518891)	\$25.00
29-Jun-23 3:36pm	Teams - Jenna Gibbons (ABF: 636096)	Julian Foster (ABF: 518891)	\$25.00
29-Jun-23 3:36pm	Teams - Julian Foster (ABF: 518891)	Julian Foster (ABF: 518891)	\$25.00

## 11. Access



This will enable nominated club administrators to control who has access to assorted parts of this club menu. At the moment access has to be requested and provided manually by Julian Foster.

The area is governed by a concept known as “RBAC” (Role Based Access Control). This works by defining certain roles in the system (which govern what areas can and cannot be accessed) and then creating groups of users who have that role.

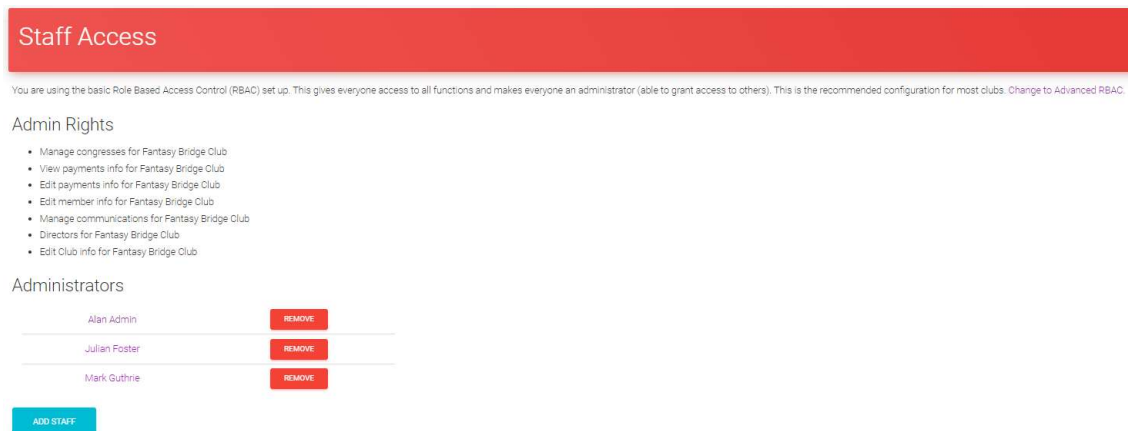
There are then “administrators” who have the rights to change who is a member of those groups. Note that “Administrator” in this context is nothing to do with Club administration, it’s more an IT concept and purely refers to someone who has the right to change the list of people with access. Administrators do not necessarily need to have access to the functionality itself, they just have the right to change who DOES have access.

There are two options that clubs can use:

### 11.1. Basic RBAC

In this option, there is a single group of administrators and they all have access to all the club administration areas and the ability to change who else has that access. This will be perfectly adequate for most clubs and it is how clubs already set up in My ABF will initially be set up.

The initial screen looks like this:



To add someone new to the list, click “Add Staff”, select the user and click OK.

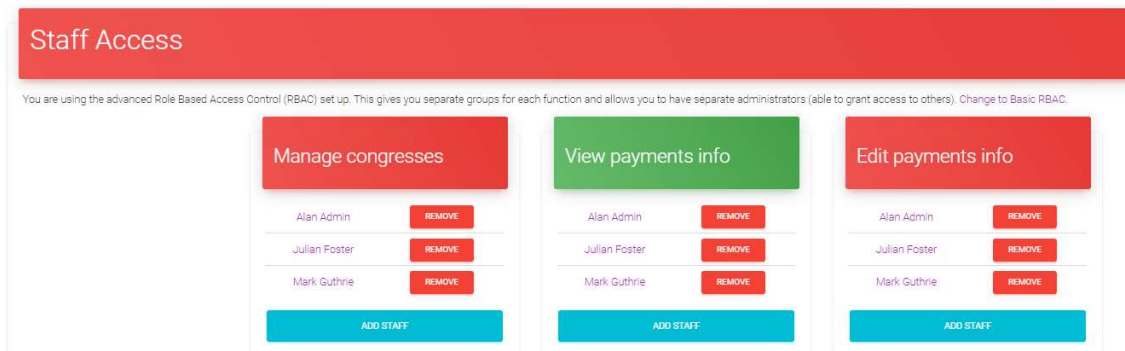
To remove someone from the list click “Remove” and confirm. There always has to be one administrator so it is impossible to remove the last one.

If you wish to change to the Advanced access, click on the link at the top right of this screen .

## 11.2. Advanced RBAC

In this option, there are separately defined groups of users for different areas. This allows different people to be given access to different areas if desired. This will probably only be needed by larger clubs.

The screen looks initially something like this:



There are 8 specific groups at present:

- Manage Congresses (\*)
- View Payments Info (\*)
- Edit Payments Info (\*)
- Edit Member Info
- Manage Communications
- Directors
- Edit Club info
- Administrators (those with the rights to change people in the other groups)

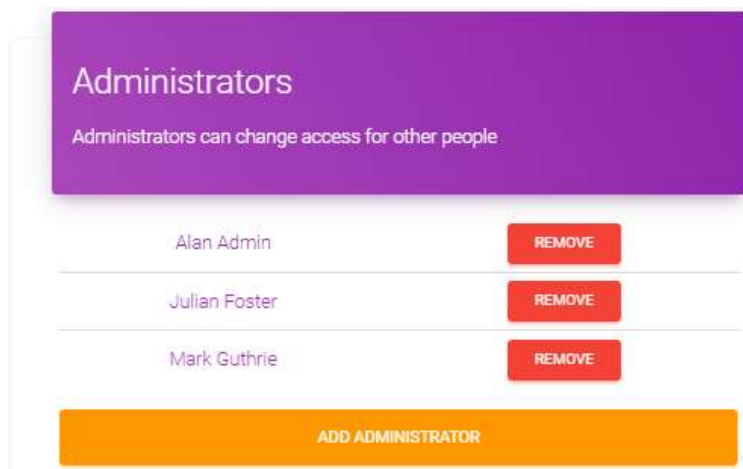
Groups marked with (\*) already exist for clubs that have run congresses. Other groups are new.

The composition of these groups and the exact functionality each gives access to can be refined over time.

Staff can be added and removed from the individual groups using the relevant buttons.

### 11.3. Who can grant or remove access to someone?

Nominated users with administration rights have the ability to do this. In Basic RBAC there is just one single group so everyone is an administrator. In Advanced RBAC there are multiple groups, one of which is Administrators. This group is shown at the bottom of the screen:



The members of that group are the only ones with the ability to change the composition of other groups – i.e. change who has access to the various areas.

Clubs should give thought to which type of access they want and, if they choose Advanced, should then give thought to who their administrator(s) should be.

There always has to be at least one administrator so it is impossible to remove the last one.

### 11.4. How will this be set up?

About 30 clubs already exist in My ABF as they have run congresses. All those clubs will be set up with Basic RBAC and all the existing people with administration rights (for Congresses and for Payments) will start off being administrators. Where we have been advised of a club secretary that person will also be given administrator access.

Where a club doesn't exist in My ABF they will need to contact Julian Foster to be set up. They will also need to advise who their initial Administrator should be – normally that would be the secretary (as listed in the ABF Masterpoint Centre) but it can be anyone the club chooses. The administrator does, of course, need to be a registered My ABF user.

## 11.5. Relevant roles and the functionality given by them

The functionality that is controllable by the various roles is described in the table below. Note this is not set in stone. If you think that the access rights should be different, changes can be made. That is part of the point of testing!

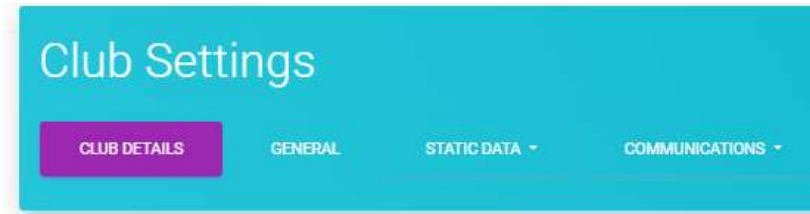
<b>Role</b>	<b>Functions available</b>
Manage Congresses	Congresses area of the menu
View Payments Info	Finance area of the menu. Able to access the club statement but not make any changes – i.e. cannot initiate a Transfer of bridge credits to a member.
Edit Payments Info	Finance area of the menu. Able to access the club statement and all functions on it. Able to access Settings – Static Data - Payment Types
Edit Member Info	Able to add members, edit member details and obtain a csv report of members.
Manage Communications	Communications area of the menu
Directors	Sessions area of the menu. Ability to transact with Registered members' bridge credits accounts.
Edit Club info	Able to edit club details and add venues.

Pages and functions not mentioned in this table are able to be accessed by anyone with any club administration access.

## 12. Settings



This section contains various settings to manage the organisation’s basic details – these are then used in other areas (primarily members, sessions, and communications). It is split into the following components:



### 12.1. Club details

It is not recommended to edit these fields as they will be out of step with the Masterpoints Centre. It is better to first change them in the MPC and then import the club here. However, bank details are fine to edit.

Club Secretary: Alan Admin (ABF: 100) <a href="#">EDIT</a>	ACT
Club Name Fantasy Bridge Club	ABF Club Number 9991
Club Email Address a@b.com	Club Website fbc.com.au
Address Line 1 A Street	Suburb Croydon
Address Line 2 West Something	Postcode 2034
Bank BSB Number 309120	Bank Account Number 98765432

[SAVE](#) [RESET](#)

last updated Tuesday 14th Jun 2022 2:30pm by

This is where you maintain the basic details for your club (initially populated from the Masterpoint Centre database) and the Secretary. The only new data fields in My ABF are the bank account details for the club (these will be required if the club is running congresses or intending to run sessions with payment through bridge credits).

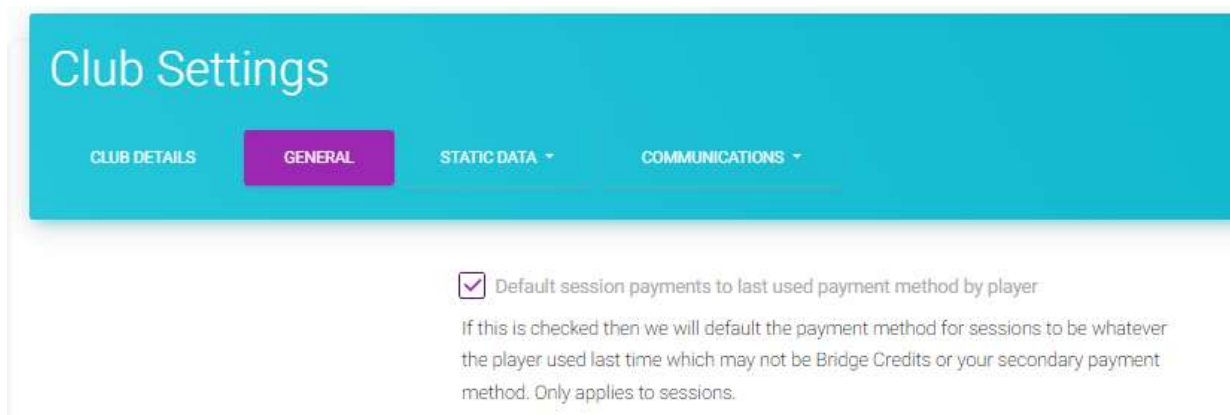
If using advanced Access control, only users with rights to edit Club info will be able to make changes to this area.



## 12.2. General

These settings are applicable only to those clubs using the Club Sessions area.

### 12.2.1. Default payment method for sessions



When you have this checkbox ticked, whatever payment method a player used the last time they played in a session at your club will be used as the default for them the next time their name is imported into a session. Obviously you can change that method and the new choice will apply thereafter.

Notes on the behaviour of this default:

- It applies only to Table fees (Extras are handled separately and can each have different payment methods).
- It only applies for that player within your club.
- It does not apply to "IOU" (see section **Error! Reference source not found.**) – if IOU is used for a player in a session, it will default back to Bridge Credits the next time.

If you do NOT have that checkbox ticked, the system will apply the following rules to determine the default payment method:

- Registered My ABF users will have their payment method defaulted to Bridge Credits (which may subsequently get changed if the player doesn't have sufficient credit in their account to actually make the payment).
- Non-registered My ABF users and guests will have their payment method defaulted to whatever the club's second choice payment is (this is chosen at **Error! Reference source not found.** above).

### 12.2.2. Venues

If a club operates from more than one venue this is where you can define those venues (which then appear in the information about Club sessions).

This club has no venues defined. This is normal if you only play at one place.

CLICK TO ADD VENUE

Once a venue has been setup, it is a parameter associated with a session and can be seen in the Settings area for that session:

## Example Bridge Club - ACT

♥ City Monday Morning 20 Feb 23 ♥

♠ 19 Apr 2023 ♠

- SETTINGS
- SESSION
- REPORTS

### Settings

Director	Julian Foster (ABF: 518891)	
Venue	Venue 1	▼
Session Type	Duplicate	▼
Session Date	19/04/2023	📅
Time of Day	Afternoon	▼
Payment Method (if not Bridge Credits)	Cash	▼
Description	City Monday Morning 20 Feb 23	

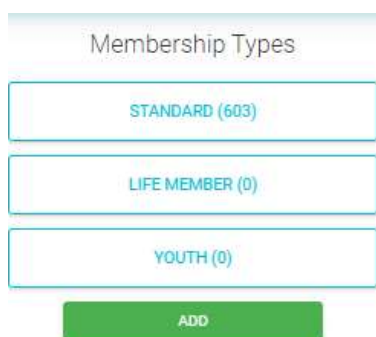
[ADD NOTES](#) [UPDATE](#)

## 12.3. Static Data



This section includes 3 different types of static data. These are items which are not expected to change that often once they have been first set up.

### 12.3.1. Memberships



This is where you define what member types you have and the parameters associated with them. Three have been set up as defaults. Many clubs will only have one but some could have several – life, honorary, concession, etc.

It is recommended that clubs set these up accurately at this stage even if they are not immediately going to be used as they will be needed in the future.

If you are going to use the functionality to send email to club members, you may wish to set these types up so that you can send messages to just a specific type of member.

If your club charges different table money to different types of member, it is essential your members listing be split by the different types so that this can be calculated properly.

### 12.3.2. Payments

If using advanced Access control, only users with the right to edit payments information will be able to access this section. It has assorted parts to it governing income and payment methods.

#### 12.3.2.1. Accepted Payment Methods

This is where you define what payment methods your club is willing to accept. These will then be available for the director to allocate to players in the session and they will flow into the financial reconciliation.

Some payment methods are fixed in the system but most can, if you wish, be disabled. It is also possible to add new methods and enable/disable them as well.

Type	Enabled
✎ Bank Transfer	ON
✎ Bridge Credits	ON
✎ Cash	ON
✎ Credit Card	ON
✎ EFTPOS	ON
✎ IOU	ON

Add new method

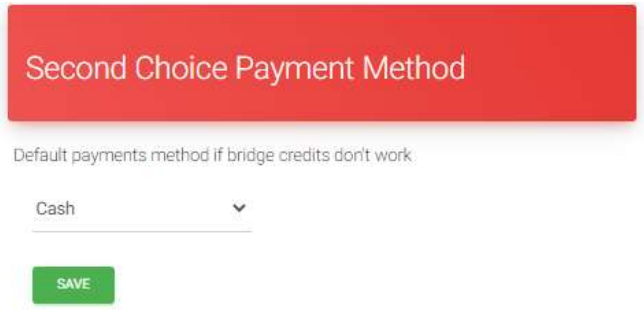
ADD

This list is used in two places:

- it will determine how your session financial reconciliations are split up.
- It allows you to specify different table money for different payment methods

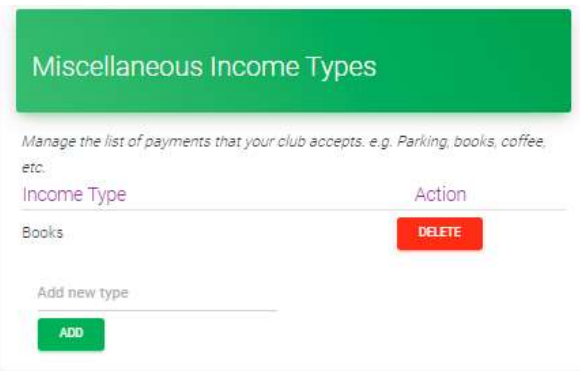
### 12.3.2.2. Second Choice Payment Method

Here you can select a second choice payment method that will be the default for players where bridge credits are not available (either because the player doesn't have a sufficient balance or because they have not authorised bridge credits to be taken from their account). This setting defaults to cash but can be changed to anything you wish.



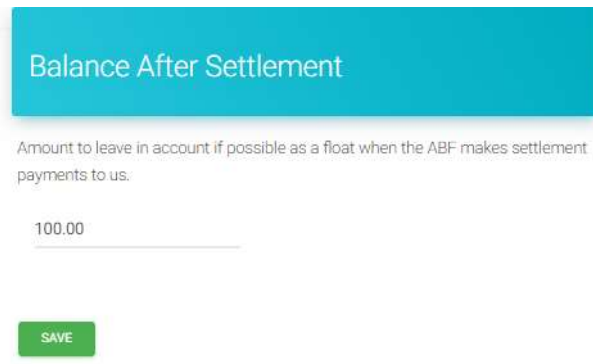
### 12.3.2.3. Miscellaneous Income Types

This area also allows you to set up Miscellaneous Income Types which are additional categories of income besides table money that you want your club to be able to record during sessions.



### 12.3.2.4. Balance after Settlement

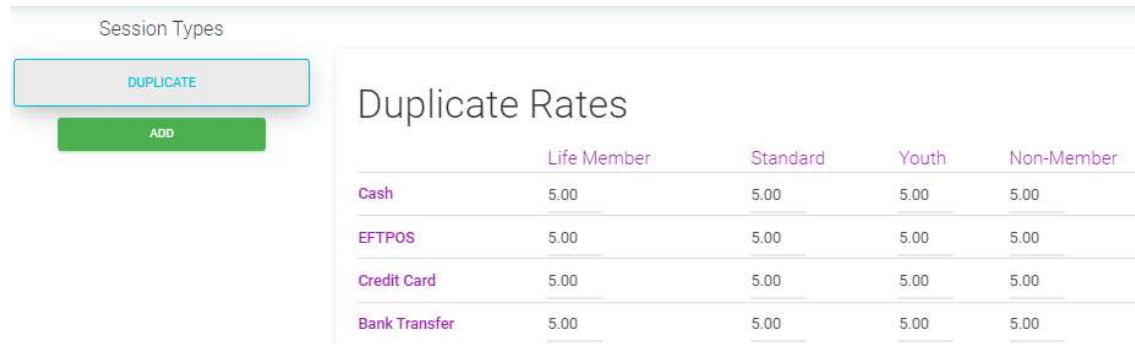
This is where the club can specify a "float" that it generally wishes to keep in its bridge credits account (to accommodate player refunds or perhaps the payment of prize money in the form of bridge credits).



This will be shown as a reduction to the available balance for settlement by the ABF.

### 12.3.3. Sessions

This is where you can define session types and the table money that applies to each. Duplicate is created as a standard session type. You can set up as many additional session types as you want (common examples could be Supervised, Lessons, etc). For each session type there is a matrix of rates presented. This allows you to specify table money rates for each different type of member (the columns) and for players who use different types of payment method (the rows). In practice a lot of these will be the same but the matrix allows complete flexibility for those clubs who do, for example, offer discounts for different payment methods.

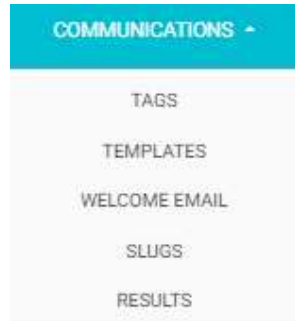


The screenshot shows a web interface for 'Session Types'. On the left, there are two buttons: 'DUPLICATE' (light blue) and 'ADD' (green). The main area is titled 'Duplicate Rates' and contains a table with the following data:

	Life Member	Standard	Youth	Non-Member
Cash	5.00	5.00	5.00	5.00
EFTPOS	5.00	5.00	5.00	5.00
Credit Card	5.00	5.00	5.00	5.00
Bank Transfer	5.00	5.00	5.00	5.00

These rates will later be used to calculate the table money for players in the session.

## 12.4. Communications



This area is where you create and manage underlying settings which are used when sending email communications to your members.

### 12.4.1. Tags

Emails will, by default, be sent to all your club members. “Tags” enable you to arrange members into different groups so you can send specific communications only to those who are interested.

Tags are used for general communications, you don't need to set up tags for things like results publishing.

You can create tags and assign them to members here (or you can also do that from the members' individual record).

Tag Name	User with Tag	Action
 Tag 1	0	<a href="#">MANAGE</a> <a href="#">DELETE TAG</a>

Add new tag

---

[ADD](#)

The pen icon to the left of the tag name can be used to edit the name at any stage:

Tag Name	User with Tag
 Tag 1	0

Tag 1

---

[RENAME](#)

Amend the text and click Rename to save the new name.

Click on Delete Tag to remove the tag altogether.

Click on Manage to add the tag to members:

Users with Tag "Tag 1"

No members have this tag yet

[ADD MEMBER TO TAG](#)
[ADD ALL MEMBERS TO TAG](#)

You can individually add members or start by adding all members.

Once you have a list of members with the tag, you are able to add or remove the tag from them:

Users with Tag "Tag 6"		
First Name	Last Name	Action
Betty	Bunting	<a href="#">DELETE TAG</a>
Julian	Foster	<a href="#">DELETE TAG</a>

[ADD ALL MEMBERS TO TAG](#)

Users without the Tag "Tag 6"		
First Name	Last Name	Action
Alan	Admin	<a href="#">ADD TAG</a>
Cecily	Foster	<a href="#">ADD TAG</a>
Chris	Dixon	<a href="#">ADD TAG</a>
Genevieve	Foskett	<a href="#">ADD TAG</a>
Jenny	Guthrie	<a href="#">ADD TAG</a>
Paula	Guthrie	<a href="#">ADD TAG</a>
Shirley	Dixon	<a href="#">ADD TAG</a>

Click on the Delete Tag or Add Tag buttons to move members between the lists.

Tags can also be added for a particular member by editing their record (see section 5.10 above).

### 12.4.2. Templates

Email templates are used to customise the appearance of emails that you send to your members.

Template Name	Action
JF Template 2 (last modified Wednesday 18th May 2022 by Julian Foster)	<a href="#">EDIT</a> <a href="#">DELETE TEMPLATE</a>
JF Template 1 (last modified Wednesday 18th May 2022 by Julian Foster)	<a href="#">EDIT</a> <a href="#">DELETE TEMPLATE</a>

[ADD NEW TEMPLATE](#)


When you add a new template you can input:

- A banner image (which will appear used across the top of the email)
- Name of the template
- From Name (the name the email recipient will see the message coming from)
- (Optional) Reply To email address (where any replies to the emails will go)
- Colours for the text and background of the subject bar (see below for how to use these)
- (Optional) A footer (which can be built in the edit box – it can include images and links as well as text).



Within the screen, edit the various sections and click Save at the bottom to save your changes.

Created new template





CHANGE BANNER

Template name  
New Template(A09)

From name

Reply to

Box colour  


Box font colour  


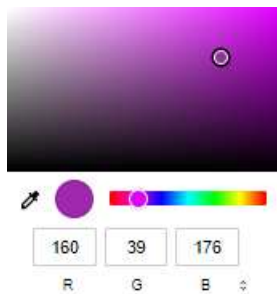
Footer (optional)

14 B I U ROBOTO A

(Optional) Enter your footer here. This will appear at the bottom of your email.

SAVE

To select colours click on the shaded box to bring up a colour selection tool:



You can select colours in this tool by:

- Using the slider bar to select the primary shade and then dragging the circular icon in the main window to the exact colour you want; or
- Using the R, G, B boxes to derive the colour you want (white is 255,255,255; black is 0,0,0)

An example is provided on the right of the screen to illustrate what an email using this template will look like.

You can edit an existing template and delete templates at any time.

**Note** if you do not use a template you will have to input some of these details each time you compose a new email. It is therefore strongly advised that clubs set up at least one template to make sending emails easier.

A template named “Results” can be set up and this will be automatically used when sending emails to users with their results. See section 7.4 above for more details.

### **12.4.3. Welcome Email**

This is where you can create a Welcome email. Build the content, select the template to be used, and send a test email to yourself. Whenever you add a new member to the club you have the option of sending them this welcome email (provided of course they have a valid email address set up).

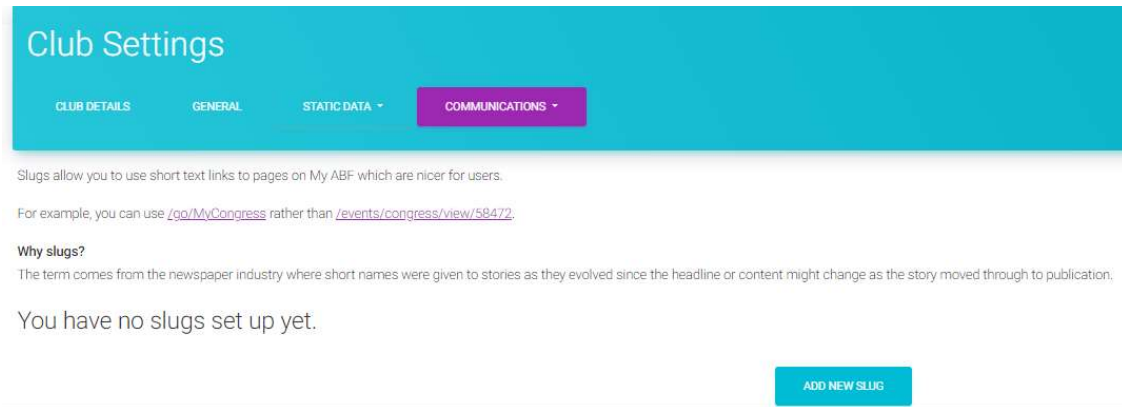
#### Welcome Email



### 12.4.4. Slugs

Slugs allow you to create a short text link that is more understandable for a user when linking to a congress page.

They will most commonly be created by users when setting up a Congress; but they can be both created and managed here.



When adding a new slug, input a short name (which has to be unique). If it's available, the system will prompt you to add the full link and, if the link is also valid, will present the Create button:

#### Add New Slug



Once created the slug is saved in a master list for your organisation.

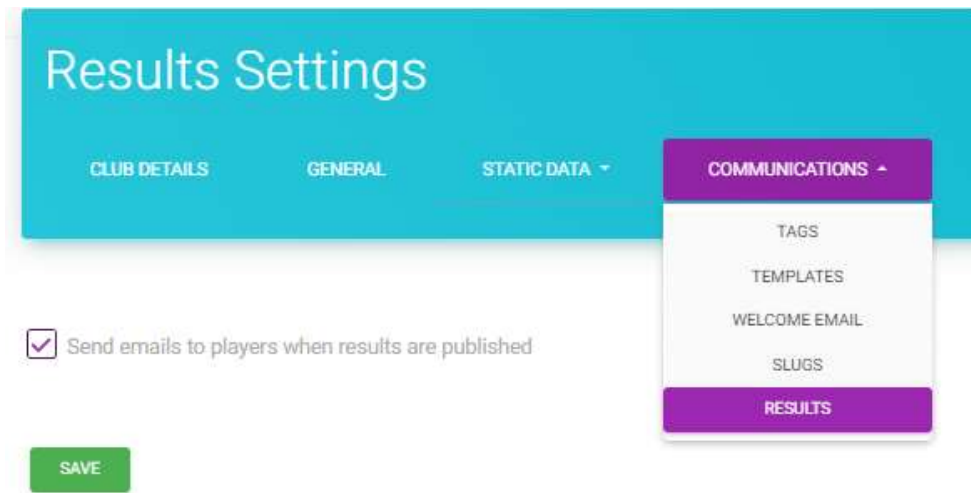
Slug	Address	Links To	Actions
FBCCongress	<a href="https://test.myabf.com.au/go/FBCCongress">https://test.myabf.com.au/go/FBCCongress</a>	<a href="https://test.myabf.com.au/events/congress/view/2">https://test.myabf.com.au/events/congress/view/2</a>	<a href="#">DELETE</a> <a href="#">EDIT</a> <a href="#">COPY TO CLIPBOARD</a>

You can now use the link [https:// myabf.com.au/go/FBCCongress](https://myabf.com.au/go/FBCCongress) to take a user direct to the My ABF Congress page (instead of needing to put the full URL including an internal congress reference number that means nothing to users).

Slugs can be edited here to be redirected somewhere else (perhaps to reuse for the next year's congress).

### 12.4.5. Results

This section contains a tickbox allowing you to enable or disable the sending of results emails to players.



A scenario where you might want to disable them is if you are already sending results emails through Pianola. Although you may wish to still publish results so your members can see their results through their My ABF dashboards, you may not want them to receive a 2<sup>nd</sup> email.

If emails are disabled through here a message will be displayed on the Results screen as a reminder.

### 12.5. Logs

This shows a log of the major changes made to the club administration areas. At this stage it can be viewed and searched but not exported.