



# Club Sessions Checklist

This version last updated: 24/07/2023

Release 3.1.15

This document covers the main steps in setting up and running Club Sessions through My ABF so that players can pay their table money with bridge credits. It includes references to the My ABF Club Sessions User guide which should be used as a reference when more details are required for any area.

Please note this checklist is intended to be useful to all clubs running sessions. If you have something you think should be added please advise [julian.foster@abf.com.au](mailto:julian.foster@abf.com.au) and I can update it.

|  | Club Sessions<br>User Guide<br>reference |
|--|--|
| <p><b>1. Getting set up to run sessions in My ABF</b></p> <p>Your club first needs to be operational in My ABF. All clubs have been set up but need an administrator to be able to access the Club Admin menu (from where Club Sessions are initiated). Contact My ABF support or Julian Foster at <a href="mailto:julian.foster@abf.com.au">julian.foster@abf.com.au</a> to advise who you want the initial administrator to be and they can be given access to the Club admin area (and then have the rights to give other people access).</p>   |  |
| <p><b>2. Recommended steps before starting club sessions</b></p> <p>Club Sessions operates most efficiently if a large majority of players at the session pay with bridge credits. It is, however, quite possible to take a “softly softly” approach, continue to accept other payment methods and gradually let players switch to bridge credits as they get comfortable with the idea and see how convenient it is. It is up to each club what approach they want to take.</p> <p>To aid in the transition it is recommended that clubs take the following steps:</p> <ul style="list-style-type: none"> <li>• Give players plenty of warning about the change.</li> <li>• Ensure you have a nominated “go-to person” at the club who can provide on-the-ground help and support for all the steps here.</li> <li>• Allay fears about online payment – all payments are handled via Stripe, one of the largest commercial online payment providers in the world. As such, My ABF does not store (or even see) any credit card details.</li> <li>• Encourage as many as possible to register for My ABF in advance (this makes both theirs and your lives easier!)</li> <li>• Encourage as many as possible to top-up funds into their bridge credits accounts in advance.</li> <li>• Encourage players to use the automatic top-up feature (this allows them to register their card details so it automatically tops-up when their balance drops below \$20).</li> </ul> |  |
| <p><b>ADDITIONAL NOTES</b></p>   |  |

|   | Club Sessions<br>User Guide<br>reference    |
|---|---|
| <b>3. Advance set up – Membership</b>   |   |
| A session is commenced by uploading a list of the player names at the session. The system then does a calculation of expected table money and this is almost always different for members and non-members (and sometimes for other reasons too). It's therefore necessary to have your up to date member listing in My ABF so the system can identify the players in the session.   |   |
| <b>Step 1 – Set up Membership types for your club</b><br>Your club may have different member types that you wish to track (either because they pay different annual membership fees or because they pay different table money). These should be set up first. This is usually a one-off step because they will very rarely change.  | 3.1   |
| <b>Step 2 – Upload your member listing (needs to be maintained so it's current)</b><br>You can upload a list of your members in a number of ways. The full details are in the Members section of the Club Admin guide.<br>Because My ABF uses this list every time a session is processed, it is important that it be kept up to date.  | 4<br><br>CLUB ADMIN<br>GUIDE –<br>SECTION 5 |
| <b>ADDITIONAL NOTES</b>   |   |
| <b>4. Advance set up – Financial</b>  |   |
| These steps are necessary before Club Sessions can be used. They will only need revisiting if you change the type of session you run or when you change your table money rates.   |   |
| <b>Step 1 – Payment types</b><br>Set up Payment types for your club (i.e. what types of payment you will accept). Most of these are obvious but one to decide is IOU (whether the club will allow players to owe them for a session and pay later with bridge credits – the concept is explained in the User guide in more depth).<br>Set up the Second Choice Payment Method (the default that someone unable to pay with bridge credits will be changed to – usually cash or EFTPOS). | 3.2.1<br><br>12<br><br>3.2.3                |
| <b>Step 2 – Session Types &amp; table money rates</b><br>Set up the types of session you run and, for each one, the table money rates for each class of member and payment method you have set up. These will be used to calculate the estimated table money that all the players in the session should be charged.   | 3.3   |
| <b>Step 3 – Miscellaneous income types</b><br>Set up any additional items of income you want to record and to allow players to pay for (e.g. book sales, coffee, etc)   | 3.2.2                                       |
| <b>Step 4 – Player's default payment method</b><br>Decide if you want the system to remember how a player paid the last time they played at your club and use that the next time their name is uploaded (recommended).  | 3.4   |
| <b>ADDITIONAL NOTES</b>   |   |

|   | Club Sessions<br>User Guide<br>reference |
|---|--|
| <b>5. Before starting a session</b>   |  |
| <b><u>Review the membership list</u></b>  |  |
| <p>Check this is still current and, if necessary, update it.</p> <p>This may be something done by directors or a club administrator. Exact procedures will vary. If the list is not up to date, however, it will create more work after the player names are imported because more players are likely to be shown with the wrong table money.</p>   |  |
| <b>ADDITIONAL NOTES</b>   |  |
| <b>6. Once the session is underway</b>  |  |
| <b><u>Step 1 – Export the player name file from Compscore</u></b>   |  |
| <p>After the players have input ABF numbers into Bridgemates (or other scoring devices) and the scoring program has the list of names, the file can be exported into My ABF. The procedure to do this varies slightly depending on whether you are using Compscore 2 or 3.</p>  | 5.2 / 5.3                                |
| <b><u>Step 2 – Create the session and import the player name file</u></b>   |  |
| <p>This is done via Club Admin – Sessions menu. Select the source (usually Compscore 2 or 3), browse to find the file exported from Compscore and upload it.</p> <p>The overall session screen should now be at step 2 - Process bridge credits.</p>  | 6  |
| <b><u>Step 3 – Review the Settings for the session (optional)</u></b>   |  |
| <p>It's possible to change the director, the venue, and add notes (this page can always be revisited later).</p>  | 6.2                                      |
| <b><u>Step 4 – Review players with insufficient bridge credits</u></b>  |  |
| <p>You may see a list of players who, whilst they have My ABF accounts, have insufficient bridge credits to pay for the session.</p> <p>You may wish to talk to these players to get them to top-up (if they have internet access they can do so themselves, or they may be happy to top-up via the club instead – see separate notes below).</p> <p>Players remaining on this list at the time the session is processed will have their payment method automatically changed to the club's second choice method.</p> | 7  |
| <b>ADDITIONAL NOTES</b>   |  |

|  | <b>Club Sessions<br/>User Guide<br/>reference</b> |
|--|---|
| <b>7. During the session - Main views</b>  |   |
| Having uploaded the player names, the system does a calculation of the table money for everyone and how they will be paying. This is based on a combination of whether they have a My ABF account (and whether they have sufficient bridge credits in that account), whether they are a member of the club and potentially the way they are paying. The system makes reference to the table fees set up for the session type being used. The system calculations should be viewed by the director or administrator and edited as necessary. There are three views available.   | 8   |
| <b><u>Summary (payment method) view</u></b><br>This summarises the session by payment method. Each section is red when it is incomplete and green when complete. Sections can be expanded to view each player within them.   | 8.1   |
| <b><u>Detail view</u></b><br>This shows a seat by seat view of each player, including their member type, table money, payment method and payment status. Non-members and players not registered with My ABF appear with different colour icons. Each player can be clicked on to access the detail screen. It tends to be the most useful overall view from which to edit things.  | 8.2   |
| <b><u>Table view</u></b><br>This is a more visual interface of the tables in the session but with the same data as above.  | 8.3   |
| <b>ADDITIONAL NOTES</b>  |   |
| <b>8. During the session – General editing</b>   |   |
| In an ideal world everyone in the session will be paying with bridge credits and all the amounts will be correct immediately upon import. If that is the case then nothing needs doing here. In practice it is often necessary to edit some players in the session to change how they are paying or perhaps correct their table money (e.g. where someone is receiving a free game). Some clubs still require players to complete some form of table slip where they will indicate how they will pay. The director needs to use that to check the players intentions match what is shown against their name in My ABF. |   |
| <b><u>On the main detail screen</u></b><br>Change payment methods as required.<br>Mark players paying OTHER than by bridge credits as processed if desired (but note it is more efficient to do this in a single step later).  | 8.2   |
| <b><u>In the player detail screen</u></b><br>Edit table fees and payment method if necessary and mark as processed (again it is more efficient to do this as a single step later).<br>Process Extras and Top-ups – see next section.   | 9   |
| <b>ADDITIONAL NOTES</b>  |   |

|  | <b>Club Sessions<br/>User Guide<br/>reference</b> |
|--|---|
| <b>9. During the session - Extras and Top-Ups</b>  |   |
| <p><b><u>Process Extras</u></b><br/>           If a player is paying for something extra besides table money, add this as a Miscellaneous Session Payment (either from the pre-set list or by manually keying in something new). Payment method and amounts can be input separately here (they are independent of how a player might be paying for table fees).</p>  | 10  |
| <p><b><u>Process Top-Ups</u></b><br/>           If a player is paying the club to top-up (rather than doing it directly), add this here. Indicate the amount and the payment method.<br/>           This will increase the player's bridge credits account balance and reduce the club's (the club has effectively received the money for the bridge credits on behalf of the ABF). Mark as processed when the club has actually taken the payment – this allows you to track receipt of the money from the player.</p>  | 11  |
| <b>ADDITIONAL NOTES</b>  |   |
| <b>10. During the session – Main processing steps</b>  |   |
| <p><b><u>Process bridge credits</u></b><br/>           When satisfied the session details are up to date, press the blue Process Bridge Credits button. This will trigger bridge credit charges for all players marked to be paid this way who have sufficient credit in their accounts.<br/>           An on-screen report will show how many payments succeeded and how many failed (those ones will have their payment method changed to the second choice method).<br/>           It is usually worth checking the Payment Methods view at this point – the Bridge credits section should now be green.<br/>           The overall session screen should now be at step 3 – Process off system payments.</p> | 13  |
| <p><b><u>Process off-system payments</u></b><br/>           It is possible to individually mark players as paid in the detail screen.<br/>           Alternatively, if you are comfortable you have collected all the money coming via other means there is a single blue button “Mark all payments received” which will update all players in one go.<br/>           At this point the Payment Methods view should show all sections green.<br/>           The overall session screen should now be at step 4 - Complete.</p>   | 14  |
| <b>ADDITIONAL NOTES</b>  |   |

|  | Club Sessions User Guide reference |
|--|------------------------------------|
| <b>11. During the session – Amendments</b>   |                                    |
| If you have processed something incorrectly it is always possible to go back to the player detail screen and edit it. If the payment was made via bridge credits that have already been processed, this will trigger a refund and a replacement charge.  | 17.1                               |
| It is also possible to add further Extras or Top-ups.  | 10 , 11                            |
| <b>ADDITIONAL NOTES</b>  |                                    |
| <b>12. After the session</b>   |                                    |
| <b><u>View reports</u></b><br>Reports for the session are available on screen and via csv or Excel download.   | 16                                 |
| <b><u>Process any further corrections</u></b><br>If any further errors are found, the session can still be edited. Alternatively you may prefer to process sundry financial adjustments (in either direction) from the Finance area of the Club Admin menu.  | 17.2                               |
| As a last resort it is possible to delete the whole session and re-process it.   | 17.3                               |
| <b><u>Publish results (optional)</u></b><br>This is not directly related to club sessions but it is possible to publish the results of club duplicates so players can be notified and see results on their dashboards. This is done by obtaining the results file from Compscore and uploading it to My ABF in the Results section of Club Admin.  | CLUB ADMIN GUIDE – SECTION 8       |
| <b><u>View bridge credit summary in the club’s bridge credits statement</u></b><br>In the Finance area of Club Admin it is possible to filter the club’s bridge credits statement for a date range and to show a summary by session (which can be expanded to see the amounts making up the total for that session).<br>Note this is a summary of the club’s bridge credits statement so it will only include bridge credit payments from players. Therefore it may not therefore match the full receipts for the session. | CLUB ADMIN GUIDE – SECTION 10      |
| <b>ADDITIONAL NOTES</b>  |                                    |