



CLUB SESSIONS - USER GUIDE

Last updated: Julian Foster 24/07/2023

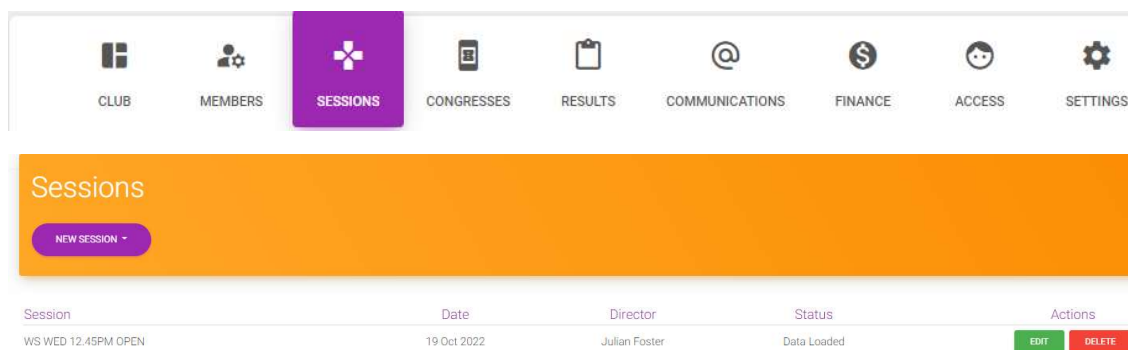
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Table of Contents

| | |
|---|----|
| 1. Introduction | 3 |
| 2. The overall procedure for running a session | 3 |
| 3. Overall club settings relevant to this area | 4 |
| 3.1. Membership Types | 4 |
| 3.2. Payment Types..... | 5 |
| 3.2.1. Accepted Payment Methods..... | 5 |
| 3.2.2. Miscellaneous Income Types | 5 |
| 3.2.3. Second Choice Payment Method..... | 5 |
| 3.2.4. Balance after Settlement | 5 |
| 3.3. Session Types (and their table fees) | 6 |
| 3.4. Option for players' default payment method..... | 7 |
| 4. Uploading members..... | 7 |
| 5. Obtaining the list of player names..... | 8 |
| 5.1. Upload from Compscore 2 | 8 |
| 5.2. Upload from Compscore 3 | 10 |
| 5.3. Import rules when there is a playing director or sitout..... | 11 |
| 6. Starting a session | 12 |
| 6.1. Uploading the names file into My ABF | 12 |
| 6.2. Settings for the session | 13 |
| 7. Session | 13 |
| 8. Main session views..... | 14 |
| 8.1. Summary View Screen | 14 |
| 8.2. Detail view screen | 14 |
| 8.3. Table view screen..... | 15 |
| 8.4. Options..... | 16 |
| 9. Individual player detail screen | 16 |
| 9.1. Table fees | 17 |
| 9.2. Extras..... | 17 |
| 10. Extras..... | 17 |

| | |
|--|----|
| 10.1. Add an individual extra for a player | 18 |
| 10.2. Add an extra for multiple players | 19 |
| 10.3. Viewing Extras..... | 20 |
| 10.4. Extras in session reports | 20 |
| 11. Top-Ups | 21 |
| 12. IOUs..... | 22 |
| 13. Processing Bridge Credits..... | 24 |
| 13.1. What players see in their statements..... | 25 |
| 13.2. What clubs see in their statements | 25 |
| 14. Processing Off System Payments..... | 26 |
| 15. Email notifications to players..... | 28 |
| 15.1. Auto top-up..... | 28 |
| 15.2. IOU | 28 |
| 15.3. Low balance warning | 29 |
| 15.4. Additional charge..... | 30 |
| 15.5. Additional receipt | 30 |
| 16. Reports..... | 31 |
| 16.1. Basic and full report | 31 |
| 16.2. Payment Methods report | 32 |
| 16.3. Low balance report | 32 |
| 16.4. Messages..... | 32 |
| 16.5. Excel and CSV downloads | 32 |
| 17. Subsequent financial adjustments..... | 33 |
| 17.1. Edit the session | 33 |
| 17.2. Make a sundry charge or payment from Finance..... | 33 |
| 17.3. Delete the session and re-do | 34 |
| 18. Overall financial reconciliation and settlement..... | 35 |
| 18.1. Viewing the club's statement | 35 |
| 18.2. Settlement | 35 |

1. Introduction



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

The initial page shows the sessions already set up, their status and an ability to edit or delete them. It is also where new sessions are begun.

2. The overall procedure for running a session

The following are the broad steps to be followed in running a session through My ABF. Depending on how the club operates, this may be done by the director or by a separate club administrator:

- Make sure the club has set up all the preliminary information within the Club Admin area that is necessary to run club sessions in advance:
 - Set up member types, payment types and session types (with table rates).
 - Imported the member listing (to be kept up to date).

THEN

- Create a new session by importing a file of names from Compscore (most commonly) but it can also be set up manually.
- Adjust the basic session settings as required.

My ABF processes the incoming data to calculate table money owing by each player (having regard to their membership status and payment method) based on the list of rates set up for that session type.

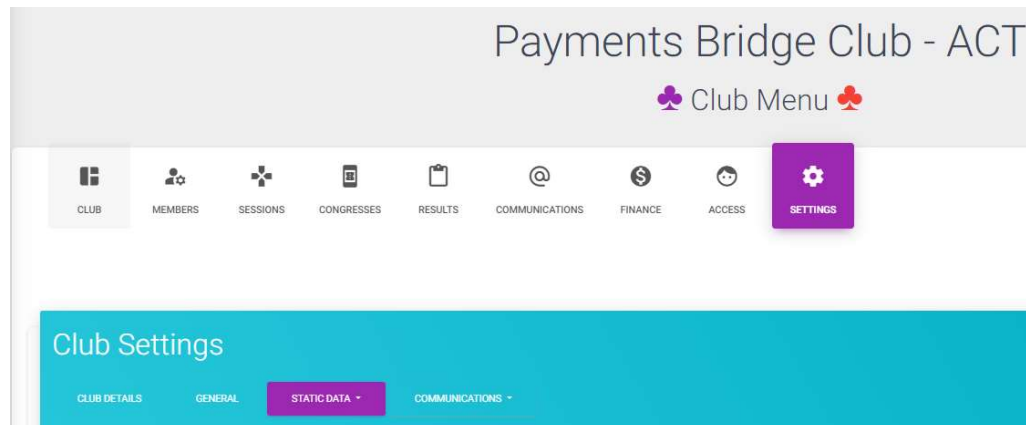
THEN

- Make any adjustments, adds any “Extras”, and any notes.
- Review potential bridge credit payments that will fail (players with balances too low who do not have auto top-up operating).
- Process bridge credit payments.
- Process Off-System payments (including “IOUs”).
- View session reports.
- Make any further refinements and re-process any further resulting payments.

3. Overall club settings relevant to this area

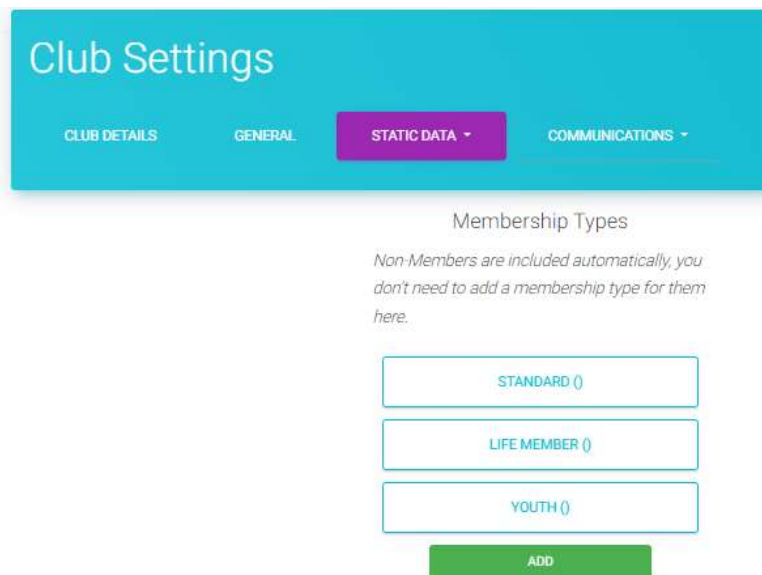
In order for the club session functionality to operate it is necessary for a club to have several settings in place first. It is also necessary for the club to have uploaded and maintained its membership list.

These are explained in depth in the Settings section of the main Club Administration Guide but are also described here for ease of reference. All are found in the main Settings menu:



3.1. Membership Types

These are found in the main club admin menu under Settings – Static Data - Memberships



This is where you define your membership types. You should generally set up a different type whenever:

- There is a variation in how much table money is charged for that member type; OR
- There is a variation in how much annual membership is charged for that member type

At this stage My ABF is only considering table money – but future releases will offer the option of tracking annual membership renewals so setting it up this way now will make life easier later.

3.2. Payment Types

These are found in the main club admin menu under Settings – Static Data - Payments

The screenshot shows the 'Club Settings' interface with the 'STATIC DATA' tab selected. The 'Accepted Payment Methods' section lists various payment types with toggle switches for enabling or disabling them. The 'Miscellaneous Income Types' section allows for adding new types of payments. The 'Second Choice Payment Method' section provides a dropdown menu to select a default payment method. The 'Balance After Settlement' section includes a text input field for specifying a balance amount.

| Type | Enabled |
|--|-------------------------------------|
| <input checked="" type="checkbox"/> Bank Transfer | <input checked="" type="checkbox"/> |
| <input checked="" type="checkbox"/> Bridge Credits | <input checked="" type="checkbox"/> |
| <input checked="" type="checkbox"/> Cash | <input checked="" type="checkbox"/> |
| <input checked="" type="checkbox"/> Credit Card | <input checked="" type="checkbox"/> |
| <input checked="" type="checkbox"/> EFTPOS | <input checked="" type="checkbox"/> |
| <input checked="" type="checkbox"/> IOU | <input checked="" type="checkbox"/> |

In this section you can do 4 distinct things:

3.2.1. Accepted Payment Methods

This is where you define what payment methods your club is willing to accept. My ABF has some defaults which will cover all common ones but you can add your own as well.

3.2.2. Miscellaneous Income Types

This allows you to define additional “Extras” that you want to allow people to pay for through My ABF. This could include books, food, raffle tickets, etc.

3.2.3. Second Choice Payment Method

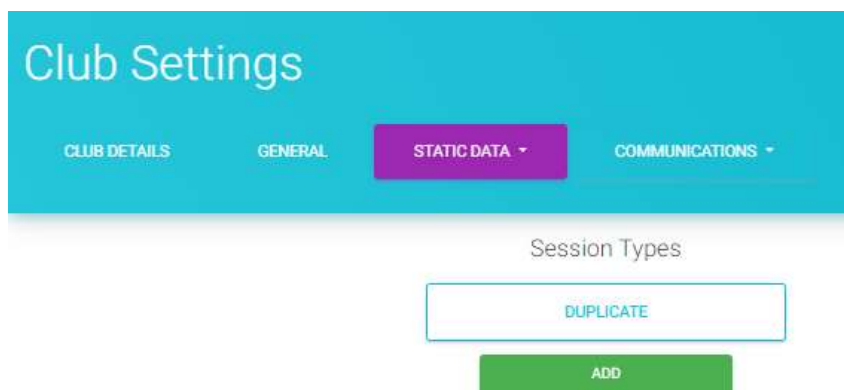
In the event of someone originally saying they would pay with bridge credits but not being able to (insufficient balance, top-up failed, etc) this allows you to select the payment method to which their setting will be changed. Cash or EFTPOS will be by far the most common settings here.

3.2.4. Balance after Settlement

This is not directly related to club session functionality – but it allows a club to specify a balance they wish to keep in their account (to fund prizes, refunds, etc) at the time the ABF settles money to them.

3.3. Session Types (and their table fees)

These are found in the main club admin menu under Settings – Static Data - Sessions



Once member and payment types are set up, sessions and the table rates for them can be defined.

A club can add as many session types as they want – you should use a different session type where the table fees are different. A default “Duplicate” one exists to start with. Each session type contains a matrix of rates based on payment method (rows) and member type (columns). There is one column for each member type set up by the club, and an additional fixed one called “Non-Member” – this is included automatically by My ABF.

Duplicate Rates

| | Life Member | Standard | Youth | Non-Member |
|----------------|-------------|----------|-------|------------|
| Bridge Credits | 5.00 | 10.00 | 5.00 | 20.00 |
| Cash | 5.00 | 13.00 | 5.00 | 23.00 |
| EFTPOS | 5.00 | 14.00 | 5.00 | 24.00 |
| Credit Card | 5.00 | 15.00 | 5.00 | 25.00 |
| Bank Transfer | 5.00 | 5.00 | 5.00 | 5.00 |
| IOU | 5.00 | 5.00 | 5.00 | 5.00 |

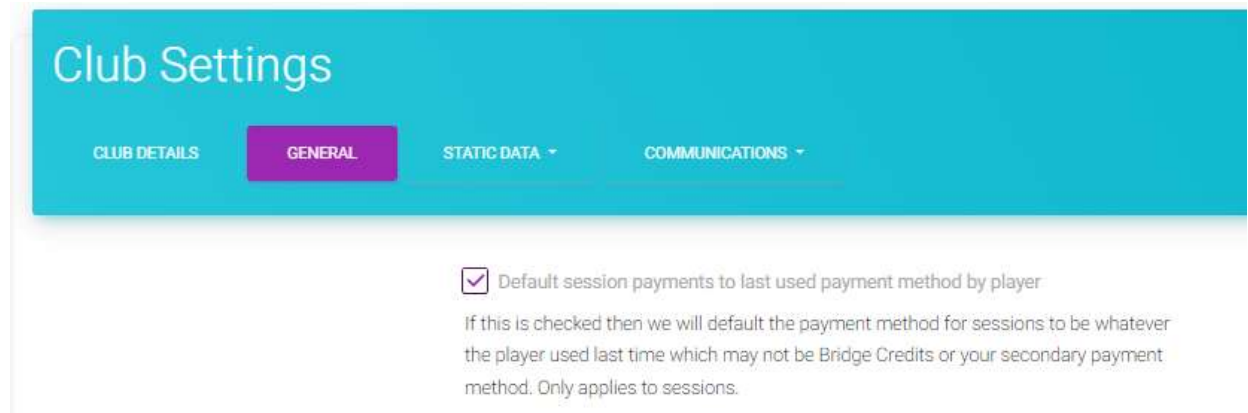
This is your only session and cannot be deleted.

Within this table you specify your table fees for that session type. It may well be the case that a lot of the rates are the same but this matrix allows for full flexibility. While most clubs charge a different rate for non-members, some clubs do also charge different rates for different membership types or based on how a player is paying.

This table governs what rates are displayed during the session against each player.

3.4. Option for players' default payment method

This is found in the main club admin menu under Settings – General



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. 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 11 below) – 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 3.2 above).

4. Uploading members

It is essential that the list of club members is imported and kept up to date. My ABF makes reference to this list every time a list of names at a club session is imported as it is used to drive the calculation of table money.

Membership lists can be imported a number of ways (from the masterpoint centre, Pianola, Compscore or a generic spreadsheet) – the Club Admin Guide (section 5) describes this in depth.

5. Obtaining the list of player names

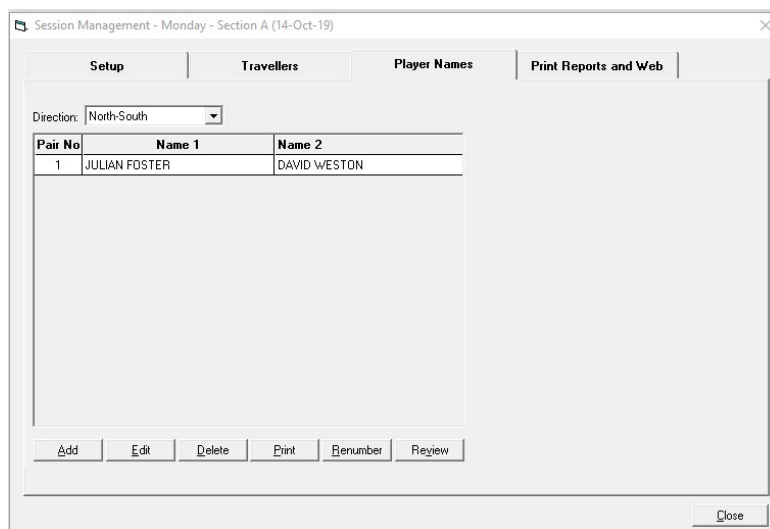
At the moment player names can be imported from Compscore (version 2 or 3). Other scoring programs may be added in due course. Instructions for both versions of Compscore are included below. Note that Compscore 2 is not being further updated so clubs are recommended to upgrade to Compscore 3.

5.1. Upload from Compscore 2

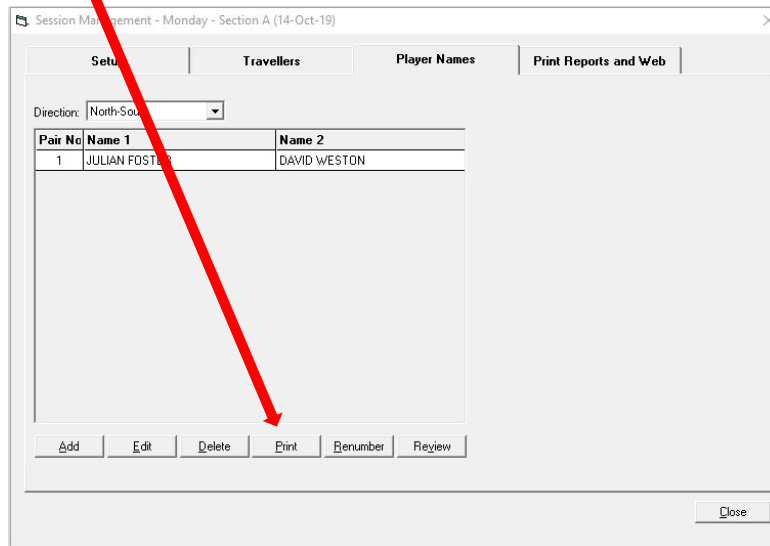
Start CS2 and do what you would normally do to run a session.

Usually, you will import the names from the BridgeMates once the players have started and have entered all of their names.

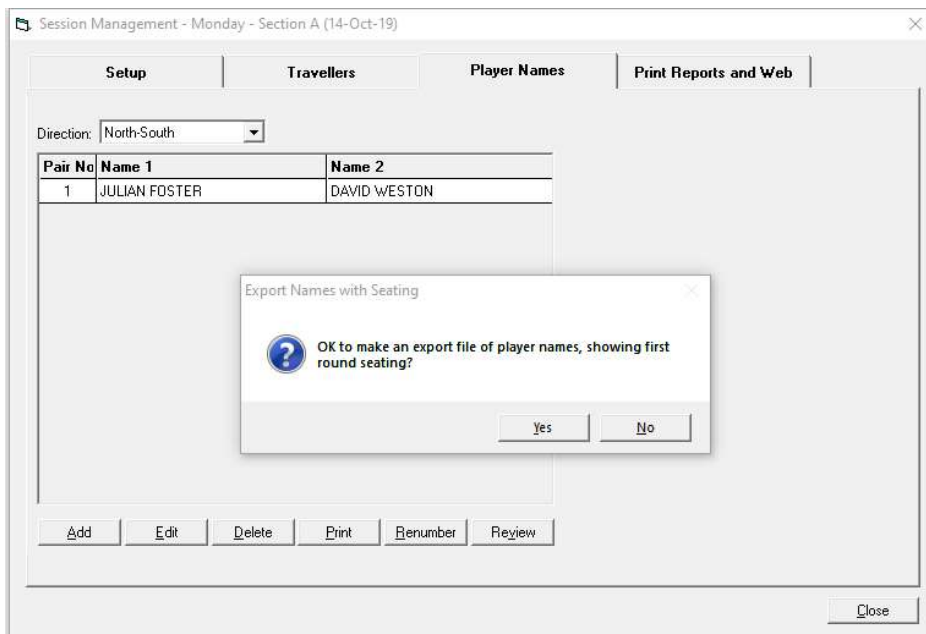
Once this is done, within the main dialog, go to the Player Names tab:



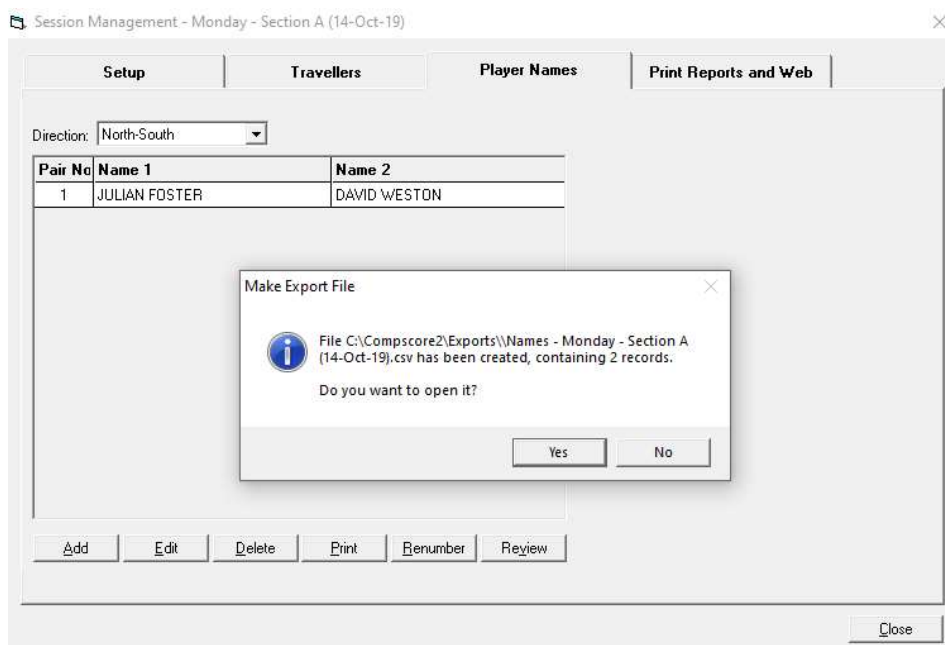
Right Click on the Print button: Note **RIGHT** click not the regular left click!



Now follow the prompts:



Click Yes to continue.



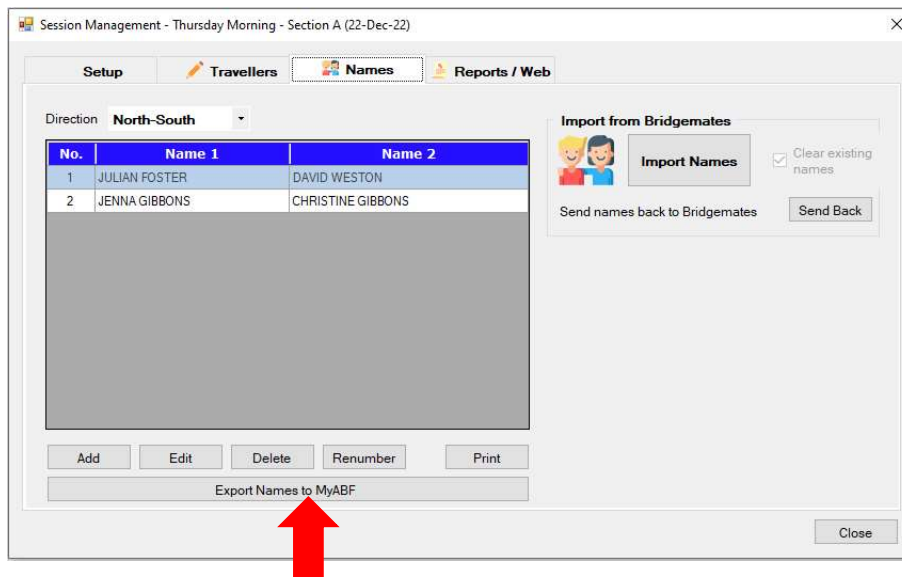
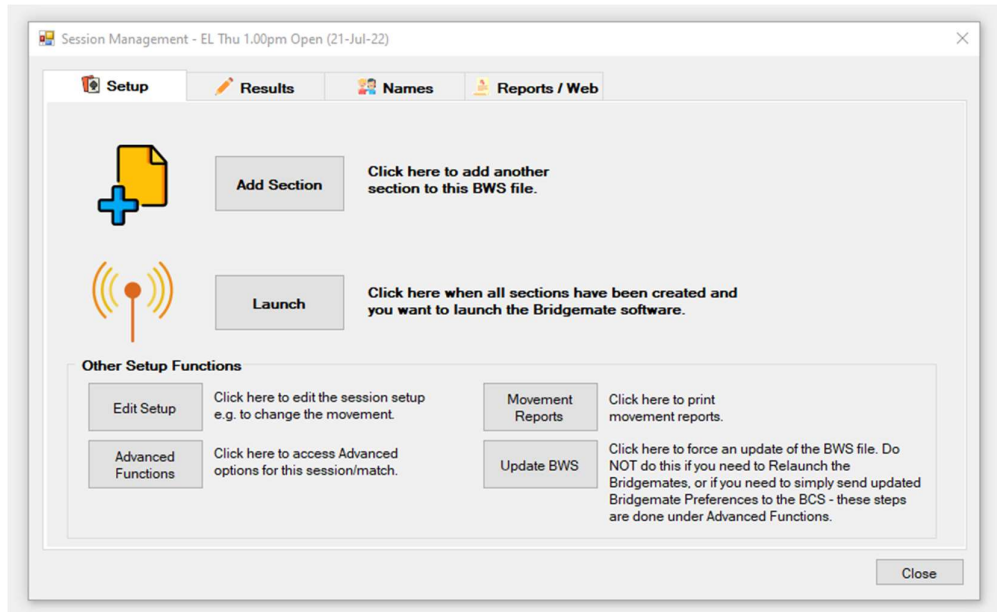
You don't need to open the file, just note where it is stored. In this example:
c:\Compscore2\Exports.

5.2. Upload from Compscore 3

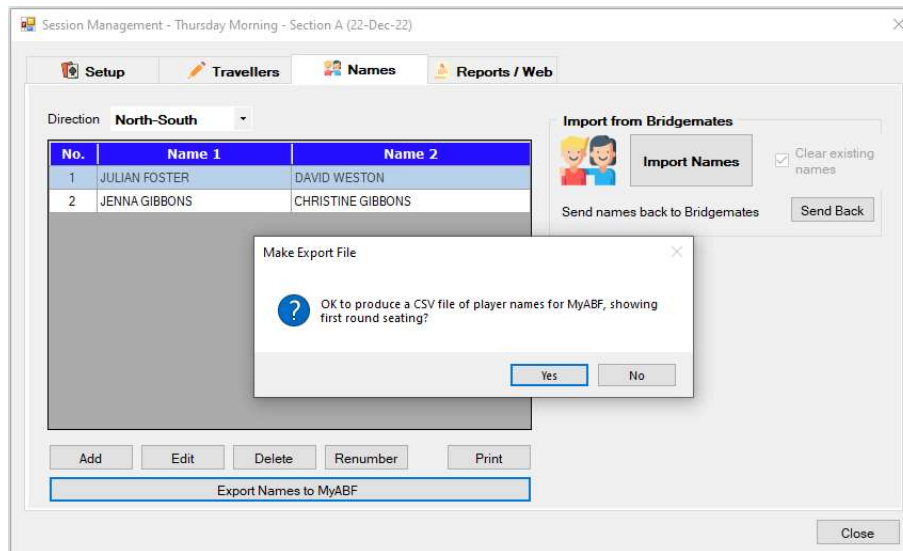
Start CS3 and do what you would normally do to run a session.

Usually, you will import the names from the Bridgemates once the players have started and have entered all of their names.

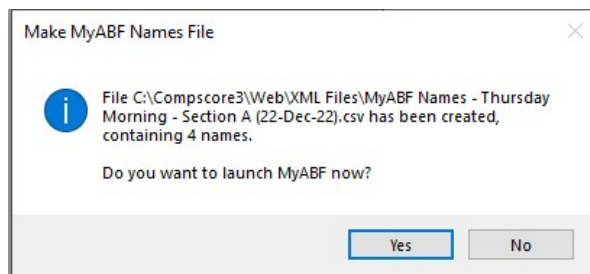
Once this is done, within the main dialog, go to the Names tab:



Click on the Export Names to My ABF button at the bottom.



Click Yes to continue. The file will then be created.



You don't need to open the file, just note the folder where it is stored. In this example:
 c:\Compscore3\Web\XML Files\

You then have the option of launching My ABF (if you already have My ABF open this will not be necessary).

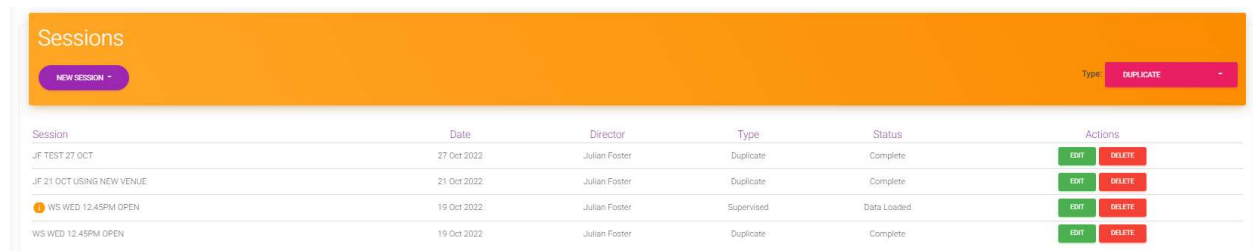
5.3. Import rules when there is a playing director or sitout

Note there are some special rules applied by My ABF when importing files with a player marked as a playing director (i.e. one who will not be named in the session results file and hence will not be eligible for any masterpoints) and/or a sitout. The following rules are applied to the import file:

- Any name with an ABF number of 1 is treated as "PLAYING DIRECTOR" and no table money applies.
- Any name with an ABF number of -1 is treated as "SITOUT" and no table money applies.
- The name "PHANTOM" with a blank ABF number is treated as "SITOUT" and no table money applies.
- Any other name (including "SITOUT") with a blank ABF number is treated as a visitor with no ABF number – to which non-member table money is applied.

6. Starting a session

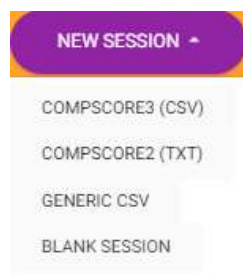
The main sessions page shows a summary of all sessions and enables you to edit or delete them.



The screenshot shows the 'Sessions' page with an orange header. On the left is a purple 'NEW SESSION' button. On the right is a 'Type' dropdown menu with 'DUPLICATE' selected. Below is a table with columns: Session, Date, Director, Type, Status, and Actions.

| Session | Date | Director | Type | Status | Actions |
|---------------------------|-------------|---------------|------------|-------------|---|
| JF TEST 27 OCT | 27 Oct 2022 | Julian Foster | Duplicate | Complete | EDIT DELETE |
| JF 21 OCT USING NEW VENUE | 21 Oct 2022 | Julian Foster | Duplicate | Complete | EDIT DELETE |
| WS WED 12.45PM OPEN | 19 Oct 2022 | Julian Foster | Supervised | Data Loaded | EDIT DELETE |
| WS WED 12.45PM OPEN | 19 Oct 2022 | Julian Foster | Duplicate | Complete | EDIT DELETE |

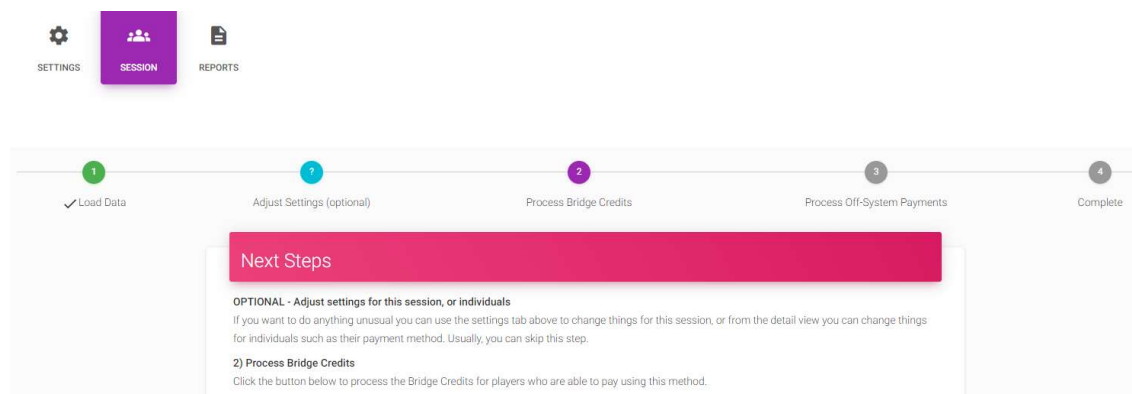
To start a new session select the relevant session type on the right and then click the purple button to select the way you will create it (most common will be to upload a player name file generated from Compscore 2 or 3):



6.1. Uploading the names file into My ABF

To upload a list of names from Compscore, select Compscore 2 (TXT) or Compscore 3 (CSV) and browse to select the names file that was exported.

Once you have created the session you will see the main step by step guide:

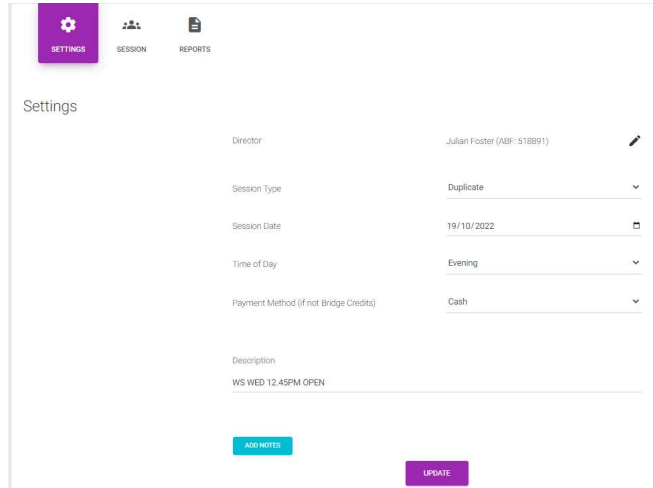


The initial upload of player names is step 1.

From here you can review and adjust any settings if required; or proceed further with the "Session" functions covered by steps 2 and 3.

6.2. Settings for the session

There are some basic parameters for the session which can be edited here. Some of these will be imported from a Compscore file or generated by My ABF (Date and Time of Day). The Director is initially assumed to be the person importing the file – but this can be changed.



Settings

Director Julian Foster (ABF: 518891)

Session Type Duplicate

Session Date 19/10/2022

Time of Day Evening

Payment Method (if not Bridge Credits) Cash

Description
WS WED 12.45PM OPEN

ADD NOTES UPDATE

You can also add notes for the session. Any sessions with notes are flagged on the front screen.

7. Session

The main session section is where you complete steps 2 and 3 of the overall process. This involves reviewing the table fees, adding extras, adding notes, and processing payments.

It starts by presenting a warning list of players identified as paying with bridge credits but who have an insufficient balance to do so:

Warnings

The following users are set to pay by Bridge Credits, but they have insufficient balances for their payments, and are not set up for Auto Top Up:

| User | Balance | Due |
|-----------------------------|---------|---------|
| Janet Jumper (ABF: 109) | \$0.00 | \$10.00 |
| Keith Kenneth (ABF: 110) | \$0.00 | \$10.00 |
| Morris Minor (ABF: 112) | \$0.00 | \$10.00 |
| Jenna Gibbons (ABF: 636096) | \$0.00 | \$20.00 |

You can still process Bridge Credits, but these will fail and will be changed to pay with Cash.

This can be used as a prompt for the director or administrator to approach these players to top-up their accounts before attempting to process bridge credit payments.

The list here will dynamically update if you manually change a player's payment method from bridge credits to something else.

Players still on this list at the time of processing bridge credits will have their payment method automatically changed to the club's second choice method.

8. Main session views

The main session screen contains 3 primary view screens and an Options button. Each are described below.



8.1. Summary View Screen



Payment Methods

| BRIDGE CREDITS (17 PAX) | \$ 0/170 | + | | |
|-------------------------|-----------------|-------|--------|------|
| CASH (3 PAX) | \$ 0/69 | + | | |
| Player | Membership Type | Fee | Extras | Paid |
| Viktor Visitor | Guest | 23.00 | 0 | 0 |
| Another Visitor | Guest | 23.00 | 0 | 0 |
| Yeti Visitor | Guest | 23.00 | 0 | 0 |

This gives a summary by payment method for the session. Bars shown in red indicate not all the expected money for that payment method has been collected. Bars shown in green indicate payment is complete for that payment method.

You can expand each bar to show the detailed list of players within it. Each line provides a link to the individual detail screen for the seat where that player is sitting. See section 9 below for a guide to that screen.

8.2. Detail view screen

| Table | Direction | Player | Membership | Fee | Payment Method | Processed | Actions |
|-------|-----------|-----------------|------------|-------|----------------|--------------------------|---------|
| 1 | N | Alan Admin | Standard | 10.00 | BRIDGE CREDITS | <input type="checkbox"/> | EDIT |
| 1 | S | Betty Bunting | Standard | 10.00 | BRIDGE CREDITS | <input type="checkbox"/> | EDIT |
| 1 | E | Keith Kenneth | Standard | 10.00 | BRIDGE CREDITS | <input type="checkbox"/> | EDIT |
| 1 | W | Lucy Likeable | Standard | 10.00 | BRIDGE CREDITS | <input type="checkbox"/> | EDIT |
| 2 | N | Viktor Visitor | Guest | 23.00 | CASH | <input type="checkbox"/> | EDIT |
| 2 | S | Debbie Dyson | Standard | 10.00 | BRIDGE CREDITS | <input type="checkbox"/> | EDIT |
| 2 | E | Morris Minor | Standard | 10.00 | BRIDGE CREDITS | <input type="checkbox"/> | EDIT |
| 2 | W | Natalie Notify | Standard | 10.00 | BRIDGE CREDITS | <input type="checkbox"/> | EDIT |
| 3 | N | Another Visitor | Guest | 23.00 | CASH | <input type="checkbox"/> | EDIT |
| 3 | S | Yeti Visitor | Guest | 23.00 | CASH | <input type="checkbox"/> | EDIT |

This gives a seat by seat listing of the players at the session. It includes member type, \$ amounts and payment method (which can be changed here). The fee may update if the payment method is changed depending on the matrix of rates for the session type. Each line again provides a link to that seat's individual detail screen where further changes can be made. See section 9 below for a guide to that screen.

Different icons and colours represent the different types of player that can appear in this listing:

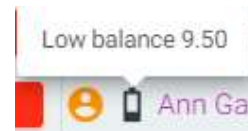
| Icon | Represents | Member status | My ABF status |
|------|------------------|---------------|--------------------------|
| | Player | Club member | Registered My ABF user |
| | Player | Club member | Unregistered My ABF user |
| | Player | Visitor | Registered My ABF user |
| | Player | Visitor | Unregistered My ABF user |
| | Player | Visitor | Not a My ABF user at all |
| | Playing Director | N/A | N/A |
| | Sitout | N/A | N/A |

Club members have purple icons, visitors have orange icons (note this club membership status is based on what is in My ABF – not the ABF masterpoint centre).

Registered My ABF users have a person icon, unregistered My ABF users have a star icon.

Other icons represent visitors without an ABF number, playing directors or sitouts.

Battery icons against a player indicate they have a low bridge credits balance (under \$20). Hover over the icon to see the actual balance:



This can be used as a prompt for the director or administrator to have a word with the player and suggest they top up their account. A player with internet access could do it online themselves of course but it is also possible for the club to accept payment directly and process it as a top-up – see section 11 below for details.

New tables can be added manually.

8.3. Table view screen



This is an alternative (more visual) representation of the tables at the start of the session.

If you hover over a player name there is a pop-up indicating the payment situation for that player.



Clicking on the player name opens the individual detail screen for that seat as described in 9 below.

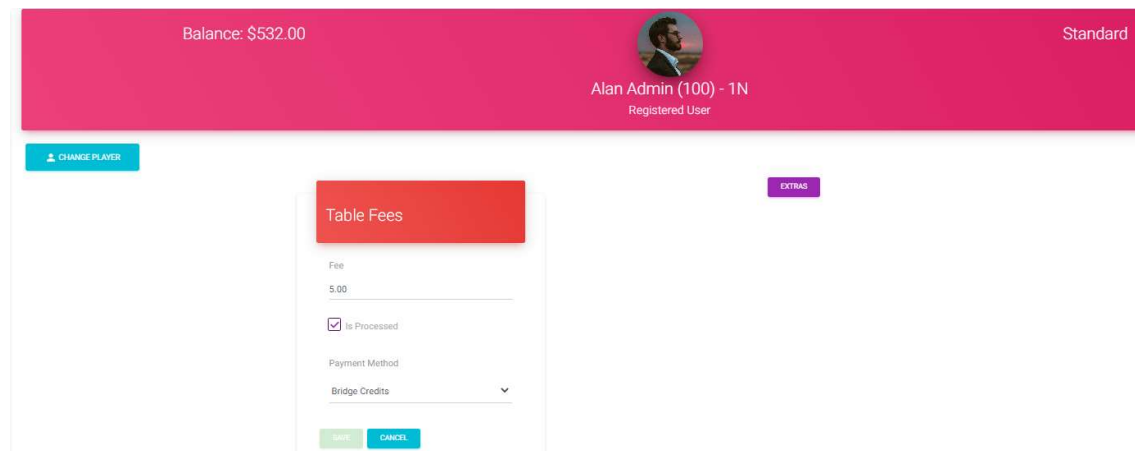
New tables can again be added manually.

8.4. Options

There is only one option here at this stage but more may be added in time. The current option allows extras to be added in bulk – this is described in detail in section 10.2 below.

9. Individual player detail screen

This screen can be opened from any of the main session view screens described above.



This screen represents the seat (Table 1 North here) in the session. The information in the header describes the player currently there, their bridge credits balance (if applicable), their member type and whether they are a registered My ABF user or not.

It is possible to change the player if necessary. This can include changing the position to/from a Playing Director (assumed to be free) or to/from a Sitout.

There are two parts to the screen – the left hand side describes the table fees, the right hand side describes any “Extras” that player is going to pay for during the session.

9.1. Table fees

The fee is initially calculated from the relevant session rates matrix taking into account the player's membership type and the payment method. Until it is marked as processed it can be manually edited here. (Once it's been marked as processed, it needs to be reversed and replaced to be changed).

The payment method is also changeable here.

It is possible to trigger the bridge credits charge from this screen if desired (although it would be unusual as it's a lot easier to process all bridge credits in one go).

If a table fee has a payment method of bridge credits, ticking "Is Processed" will make the charge to the player's bridge credits account. Subsequently unticking "Is Processed" will then generate a refund back to the player's account.

9.2. Extras

Click Extras on the right hand side to add these for this player. See section 10 below for a full explanation of Extras.

10. Extras

Extras cover anything else that a player is paying for during the session.

They are included for two main reasons:

- a) something that the player will use bridge credits to pay for; or
- b) something that the player will pay for another way which the club wishes to include as part of its financial reconciliation for the session.

It is possible to have a different payment method for each extra and also a different method to that used for the player's table money (for example a player may be happy to pay their table fees with bridge credits but want to just pay cash for a coffee and the club wishes to record that cash as part of the session reconciliation).

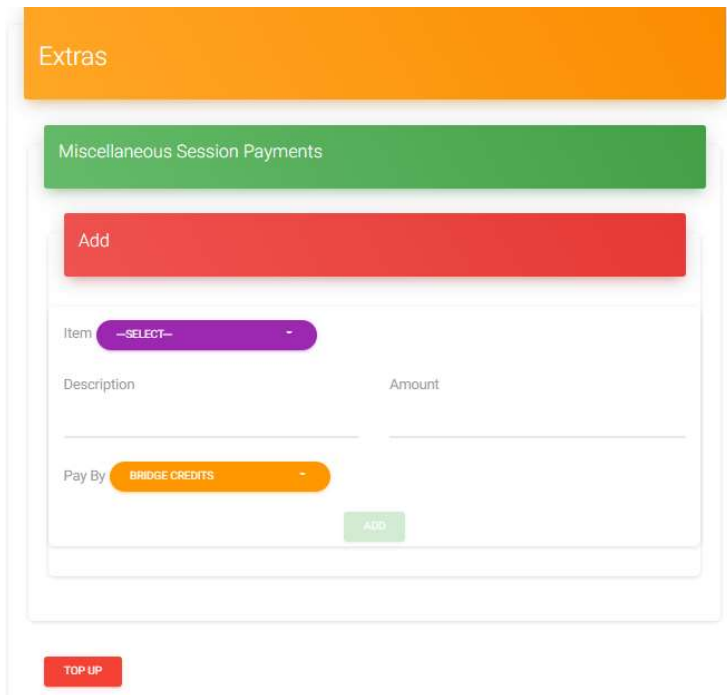
Regularly used extras can be created in Settings as "Miscellaneous Income Types" using the Payment Types settings screen (see section 3.2 above). It is also possible to just key in details for a new extra at the time it arises.

There are two ways extras can be added – individually for a player (done via the player detail screen) or in bulk to several players at once (done from the main sessions screen). Both are described below.

10.1. Add an individual extra for a player

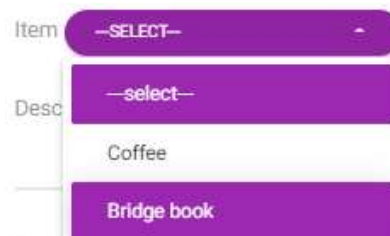
Navigate to the player detail screen (see section 9 for details).

Click Extras on the right hand side to add an Extra for this player:



The screenshot shows a mobile application interface for adding an extra. At the top is an orange header with the word "Extras". Below it is a green bar labeled "Miscellaneous Session Payments". A red "Add" button is positioned below the green bar. The main form area contains a purple dropdown menu for "Item" with "--SELECT--" selected. Below this are two input fields: "Description" and "Amount". At the bottom of the form is a "Pay By" dropdown menu with "BRIDGE CREDITS" selected, and a green "ADD" button. A red "TOP UP" button is located at the bottom left of the screen.

You can select from items already set up as “Miscellaneous Income Types”:



This image shows a close-up of the "Item" dropdown menu. The menu is purple and has "--SELECT--" selected. Below the menu, two options are visible: "Coffee" and "Bridge book".

These will populate the Description and Amount automatically. Alternatively you can key in a Description and Amount manually.

You can then select the Payment method to be used to pay for that item (each one can be different so the system can accommodate players wishing to pay for their table fees through My ABF but perhaps cash for a coffee or something) and click Add.

Where Bridge Credits are selected as the payment method the amount will be processed immediately. Where another payment method is selected, it will just be added to the list of Extras:

Bridge book added

| Miscellaneous Session Payments | | | | |
|--------------------------------|---------|----------------|--------------|--|
| Item | Cost | Pay Method | Status | Action |
| Bridge book | \$15.00 | Bridge Credits | Is Processed | <button>UNDO</button> <button>DELETE</button> |
| Bridge book | \$15.00 | Cash | Unprocessed | <button>PROCESS</button> <button>DELETE</button> |

ADD

You can mark Extras as processed individually on this screen if you wish and, if the payment method is bridge credits, this will generate a charge to the player's account. However, it is not necessary to use this screen to do that – it's a lot easier to use the single buttons on the front screen to process all Bridge Credits payments and all Off-System payments together.

10.2. Add an extra for multiple players

On the main session screen click the Options button to the right and select "Bulk Add Extras"



This brings up a list of the Extras and an alphabetical list of the players in the session:

The image shows a screen titled 'Add Miscellaneous Payments to Multiple Players'. The screen is divided into two main sections. The left section, titled 'Add Miscellaneous Payment', contains a form with the following fields: 'Item' with a dropdown menu showing '--SELECT--', 'Description' and 'Amount' input fields, and 'Pay By' with a dropdown menu showing 'BRIDGE CREDITS'. The right section, titled 'Select Players', contains a list of checkboxes next to player names: 'SELECT ALL', 'Alan Admin', 'Alan Quinton', 'Anne Milson', 'Anthony White', 'Betty Bunting', 'Catherine Lemech', 'Diana McAuliffe', and 'Evi Trotter'.

You can use this screen to add a single extra item with a single payment method to a group of selected players.

On the left hand side of the screen select the item you wish to add from the pre-set list (you can also type in a new one if you wish) and select the payment method to be used.

On the right hand side of the screen tick the players to which you want to charge this extra.

Click Add at the bottom of the screen and the extra item will be added to each of these players.

Note this will not process payment for any of these extras, that is done through the general steps of processing bridge credits and other payments.

10.3. Viewing Extras

When Extras exist additional columns show in the Detail view screen:

| Table | Direction | Player | Membership | Fee | Fee Payment Method |
|-------|-----------|------------|------------|-------|--------------------|
| 1 | N | Alan Admin | Standard | 10.00 | BRIDGE CREDITS |

| Extras | Total | Fee Processed | Extras Processed | Actions |
|--------|-------|-------------------------------------|-------------------------------------|---------|
| 26.00 | 36.00 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | EDIT |

continued:

Note the Fee Payment Method displayed on the main Detail view only relates to the Table Fee – because each Extra item can use a different payment method.

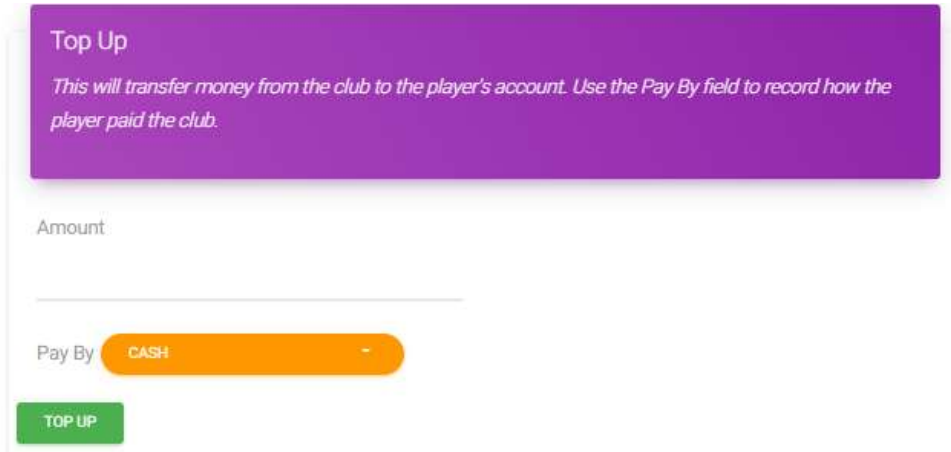
10.4. Extras in session reports

Extras are listed in a separate section in the csv and Excel reports for the session. This enables the expected table money to be reconciled.

11. Top-Ups

In the event a player cannot, or refuses to, top-up their account online themselves but is willing to pay money to the club to do so, this can be accommodated.

It is treated as a special type of Extra. Click the red Top-Up button at the bottom of the Extras section:



Here you can specify the amount and the payment method. Adding this will list it in the Extras where you can mark it as paid (i.e. indicate you have taken the funds). This will add the amount to the player's bridge credits account and process an opposite amount to the club account (effectively the club now owes the ABF the money they have just collected and credited to the player's account).

IMPORTANT NOTE ON FEES:

Clubs should be aware they will incur their own EFTPOS transaction fees for processing the player's payment in this situation.

The operation of the 2% fee from My ABF is, however, neutral. The club's balance is reduced by the player payment initially (which will reduce the 2% fee) and will gradually go back up again as the player plays in sessions (which will put it back again).

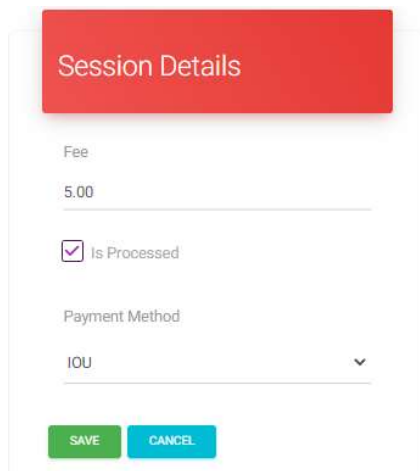
It is obviously up to clubs whether they are willing to do top-ups like this to help players (who may not be comfortable with an online type of transaction like bridge credits or may not have easy internet access while at a session) but they may wish to charge the players an additional fee for the service.

12. IOUs

Where a registered My ABF user does not have enough credits to pay for the session or for some other reason, it is possible to use a payment method of “IOU”. It is entirely up to the club whether they are willing to accept this or not – it is one of the payment methods a club can enable or disable in its Payment Settings (see section 3.2 above).

IOU’s are only available for registered users (the expectation is the IOU will be later paid online through the bridge credits system). If your club wants to allow the same sort of concept for members who are not registered for My ABF, it is recommended you add your own payment method to this effect (see 3.2.1 above) and manage it outside My ABF.

An IOU is treated like a payment for the session fees but it records a debt for the player to be collected later.



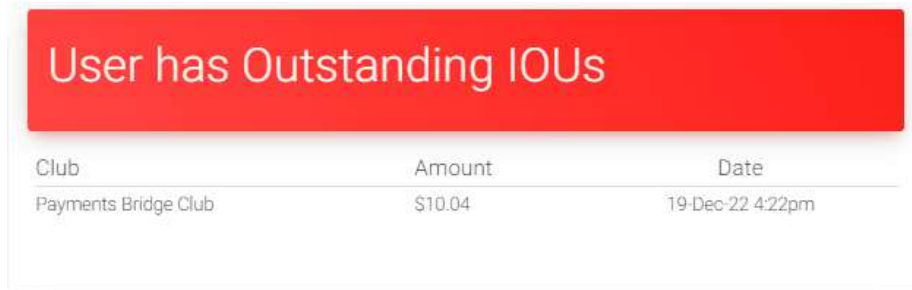
The screenshot shows a 'Session Details' form with the following fields:

- Fee: 5.00
- Is Processed
- Payment Method: IOU (selected from a dropdown menu)

At the bottom of the form are two buttons: 'SAVE' (green) and 'CANCEL' (blue).

When an IOU is processed several things happen:

- It shows up at the top of the player’s individual detail screen (above any Extras):



The screenshot shows a red banner at the top of the player's detail screen with the text "User has Outstanding IOUs". Below the banner is a table with the following data:

| Club | Amount | Date |
|----------------------|---------|------------------|
| Payments Bridge Club | \$10.04 | 19-Dec-22 4:22pm |

- b) If the player logs in, it is displayed at the top of their own Dashboard with the ability to pay it with bridge credits:

Hi Betty

Pending Payments

| Club | Description | Date | Amount | Action |
|----------------------|---------------------|------------------|--------|-------------------------|
| Payments Bridge Club | WS WED 12:45PM OPEN | 19 Oct 22 9:25pm | \$5.00 | PAY NOW |

Bridge Credits
404.44

Last event: Saturday 24th Sep 2022 4:36pm

Booked Events
4

Events

Masterpoints
Not found

Note – players should be encouraged to top-up their account (minimum \$50) first rather than simply pay a one-off small IOU amount. The transaction fees on small payments are relatively higher.

- c) The Finance menu for the club also displays the outstanding debts – and an ability to cancel them.

CLUB MEMBERS SESSIONS CONGRESSES RESULTS COMMUNICATIONS **FINANCE** ACCESS SETTINGS

Finance

[TRANSACTION](#) [CSV DOWNLOAD](#)

Club Balance: \$0.00 Members' Balance: \$2,772.66

Outstanding Debts

| Player | Description | Date | Amount | Action |
|--------------------------|---------------------|------------------|--------|-----------------------------|
| Betty Bunting (ABF: 101) | WS WED 12:45PM OPEN | 19 Oct 22 9:25pm | \$5.00 | CANCEL DEBT |

Note that an IOU is treated as a Payment Method for a session and is reported as such. Subsequent payment of that debt does not change the reports for the session – they remain fixed (otherwise the reports could become a moving target). Effectively the debt is collected separately from the session.

Note also that we have deliberately used the term “Processed” for club session items instead of “Paid”. This is to avoid potential confusion around IOU’s – they are “processed” when they are finalised as the payment method for that player for that session. The debt is what is “paid” later.

13. Processing Bridge Credits

Step 2 of the overall Session procedure is to process bridge credit payments. This is most easily done with a single button press from the main screen for the session:

Next Steps

OPTIONAL - Adjust settings for this session, or individuals
If you want to do anything unusual you can use the settings tab above to change things for this session, or from the detail view you can change things for individuals such as their payment method. Usually, you can skip this step.

2) Process Bridge Credits
Click the button below to process the Bridge Credits for players who are able to pay using this method.

Warnings

The following users are set to pay by Bridge Credits, but they have insufficient balances for their payments, and are not set up for Auto Top Up:

| User | Balance | Due |
|----------------------------------|---------|---------|
| Keith Kenneth (ABF: 110) | \$0.00 | \$10.00 |
| Morris Minor (ABF: 112) | \$0.00 | \$10.00 |
| Natalie Notify (ABF: 113) | \$0.00 | \$10.00 |
| Oliver Caolán O'Tracy (ABF: 114) | \$0.00 | \$10.00 |
| Penelope Pencil (ABF: 115) | \$0.00 | \$10.00 |
| Gary Golden (ABF: 106) | \$0.00 | \$10.00 |
| Heidi Hempstead (ABF: 107) | \$0.00 | \$10.00 |
| Quentin Quill (ABF: 116) | \$0.00 | \$10.00 |
| Rajni Ramachandran (ABF: 117) | \$0.00 | \$10.00 |
| Iain Igloo (ABF: 108) | \$0.00 | \$10.00 |
| Janet Jumper (ABF: 109) | \$0.00 | \$10.00 |
| Simon Sez (ABF: 118) | \$0.00 | \$10.00 |
| Tatiana Tarasova (ABF: 119) | \$0.00 | \$10.00 |

You can still process Bridge Credits, but these will fail and will be changed to pay with Cash.

PROCESS BRIDGE CREDITS

This will attempt to process all items (table fees and extras) with a payment method of bridge credits. It will bring up a summary of how many payments succeeded and failed. The failed ones have their payment method changed to the method selected as the second choice (cash in this example).

Bridge Credits processed. Success: 3. Failure 13.

Payment Failures

We were unable to process bridge credits for the following people:

- Keith Kenneth (ABF: 110)
- Morris Minor (ABF: 112)
- Natalie Notify (ABF: 113)
- Oliver Caolán O'Tracy (ABF: 114)
- Penelope Pencil (ABF: 115)
- Gary Golden (ABF: 106)
- Heidi Hempstead (ABF: 107)
- Quentin Quill (ABF: 116)
- Rajni Ramachandran (ABF: 117)
- Iain Igloo (ABF: 108)
- Janet Jumper (ABF: 109)
- Simon Sez (ABF: 118)
- Tatiana Tarasova (ABF: 119)

Their payment method has been changed to **Cash**.

At this stage it can be seen the Payment Methods summary has changed to show the Bridge Credits items as green (i.e. complete):

Payment Methods

| | | | |
|---|------------------------|----------|---|
| ✓ | BRIDGE CREDITS (4 PAX) | \$ 45/45 | + |
| ✓ | IOU (1 PAX) | \$ 5/5 | + |
| ! | CASH (17 PAX) | \$ 0/249 | + |

Note – if you subsequently change someone’s payment method back to Bridge Credits or add a new Extra with a Bridge Credits payment method, you will be returned to step 2 and the Process Bridge Credits button will reappear.

13.1. What players see in their statements

Players for whom a bridge credit payment is processed will see a line item in their bridge credits statement:

Bridge Credits - Alan Admin

Inactive - Used to play at Unknown

Balance: 546 credits

Auto Top Up OFF

[↓ DOWNLOAD AS CSV](#)

| Date | Counterparty | Type | Description | Credits In | Credits Out | Balance |
|-------------|----------------------|--------------|----------------------------------|------------|-------------|---------|
| 19 Oct 2022 | Payments Bridge Club | Club Payment | WS WED 12.45PM OPEN - 2022-10-19 | | 25.00 | 546.00 |

The line item provides a description of the session and has a type of “Club Payment”.

Note: If a player has table fees and extras processed together, they are shown as a single line. Extras processed separately will generate their own line item.

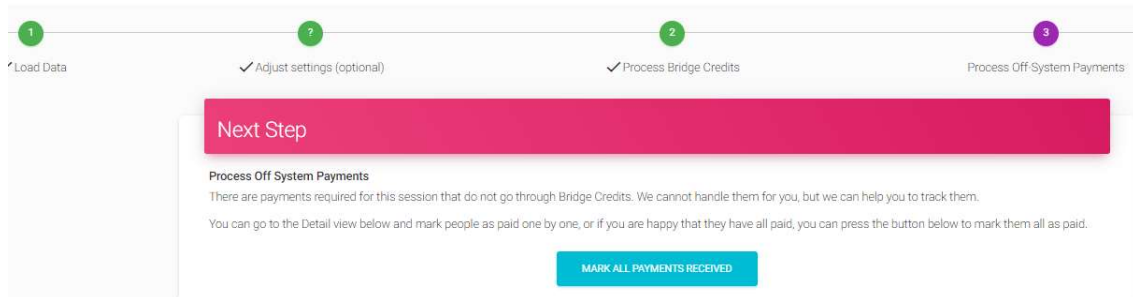
13.2. What clubs see in their statements

The club also sees line items for each player payment. There is also an ability to compress the display and show a summary for the sessions.

| Transactions | | | | | |
|----------------------|----------------------------------|--------------------------|------------|-------------|--|
| ■ Summarize Sessions | | | | | |
| Date | Description | Who | Amount(\$) | Balance(\$) | |
| 19 Oct 22 9:46pm | WS WED 12.45PM OPEN - 2022-10-19 | Debbie Dyson (ABF: 103) | \$10.00 | \$45.00 | |
| 19 Oct 22 9:46pm | WS WED 12.45PM OPEN - 2022-10-19 | Lucy Likeable (ABF: 111) | \$10.00 | \$35.00 | |
| 19 Oct 22 9:46pm | WS WED 12.45PM OPEN - 2022-10-19 | Alan Admin (ABF: 100) | \$25.00 | \$25.00 | |

14. Processing Off System Payments

Having completed Bridge Credits processing, the system moves onto step 3 – processing off-system payments.

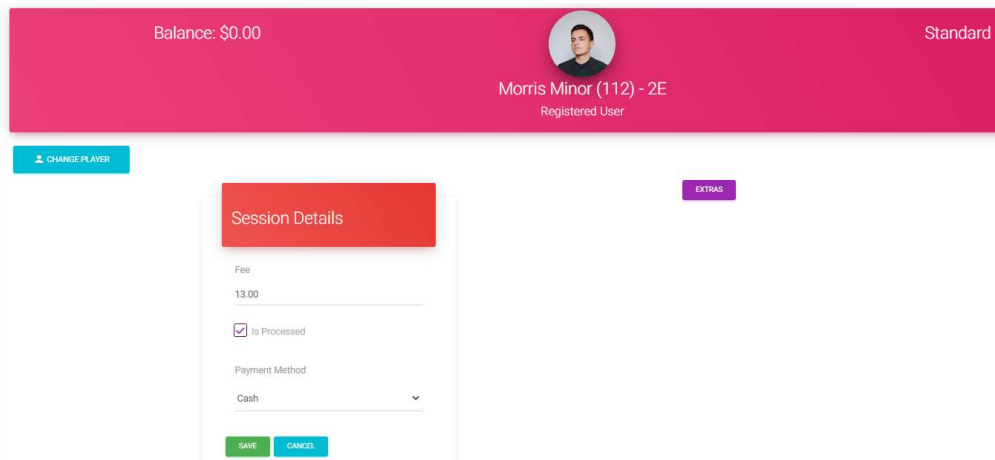


There are three ways to update Off-system payments.

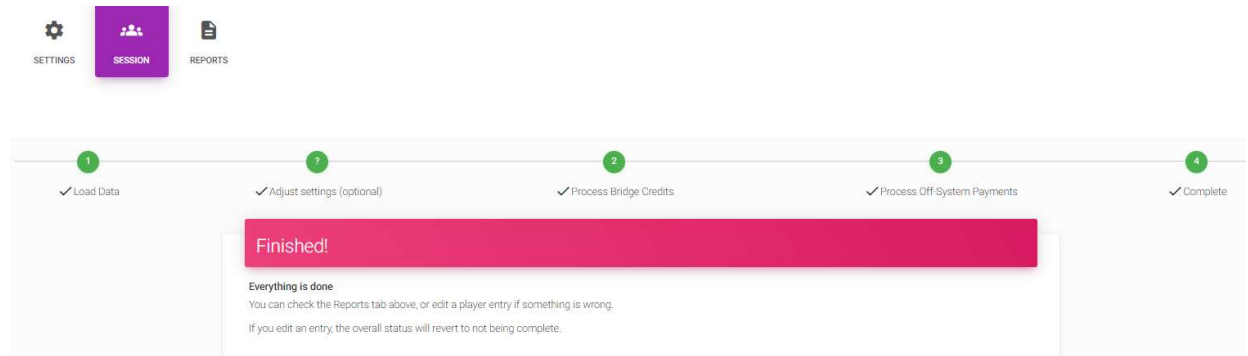
- Mark everything as paid with a single button press if you are comfortable that is the case.
- Review the detail screen and for players not using bridge credits the “Fee Processed” column can be manually ticked to mark that player as paid. Note the Extras Processed column cannot be manually ticked here – that’s because there could be multiple extras and each could have a different payment method.

| Table | Direction | Player | Membership | Fee | Fee Payment Method | Extras | Total | Fee Processed |
|-------|-----------|----------------|------------|-------|--------------------|--------|-------|-------------------------------------|
| 1 | N | Alan Admin | Standard | 10.00 | BRIDGE CREDITS - | 26.00 | 36.00 | <input type="checkbox"/> |
| 1 | S | Betty Bunting | Standard | 5.00 | IDU - | 0 | 5.00 | <input type="checkbox"/> |
| 1 | E | Keith Kenneth | Standard | 13.00 | CASH - | 0 | 13.00 | <input checked="" type="checkbox"/> |
| 1 | W | Lucy Likeable | Standard | 10.00 | BRIDGE CREDITS - | 0 | 10.00 | <input type="checkbox"/> |
| 2 | N | Viktor Visitor | Guest | 23.00 | CASH - | 0 | 23.00 | <input checked="" type="checkbox"/> |
| 2 | S | Debbie Dyson | Standard | 10.00 | BRIDGE CREDITS - | 0 | 10.00 | <input type="checkbox"/> |
| 2 | E | Morris Minor | Standard | 13.00 | CASH - | 0 | 13.00 | <input type="checkbox"/> |
| 2 | W | Natalie Notify | Standard | 13.00 | CASH - | 0 | 13.00 | <input type="checkbox"/> |

- Open the individual player’s detail screen and tick the “Is Processed” box there for the Tables fees and the relevant buttons for any Extras:



Once you are happy everything has been collected and everything is marked as processed, you have reached step 4 - the session is complete and all Payment method are shown in green.



Off System payments made

Payment Methods

| | | | |
|---|------------------------|------------|---|
| ✓ | BRIDGE CREDITS (4 PAX) | \$ 45/45 | + |
| ✓ | IOU (1 PAX) | \$ 5/5 | + |
| ✓ | CASH (17 PAX) | \$ 249/249 | + |

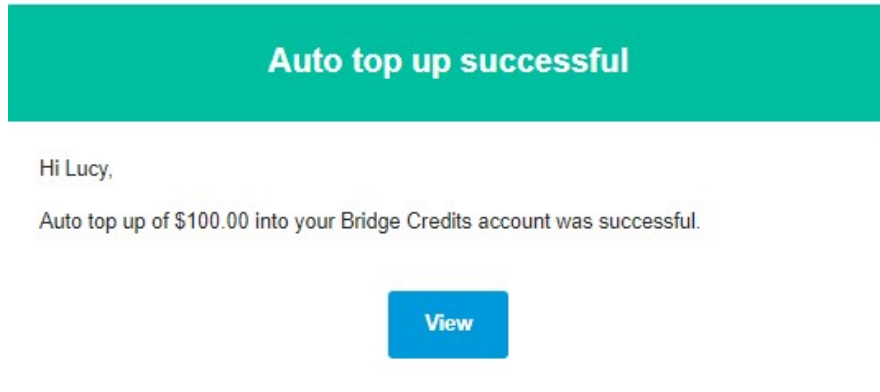
If you subsequently edit a player's payment information the status will revert back to steps 2 or 3 accordingly.

15. Email notifications to players

Players can receive assorted email notifications as a result of paying for club sessions.

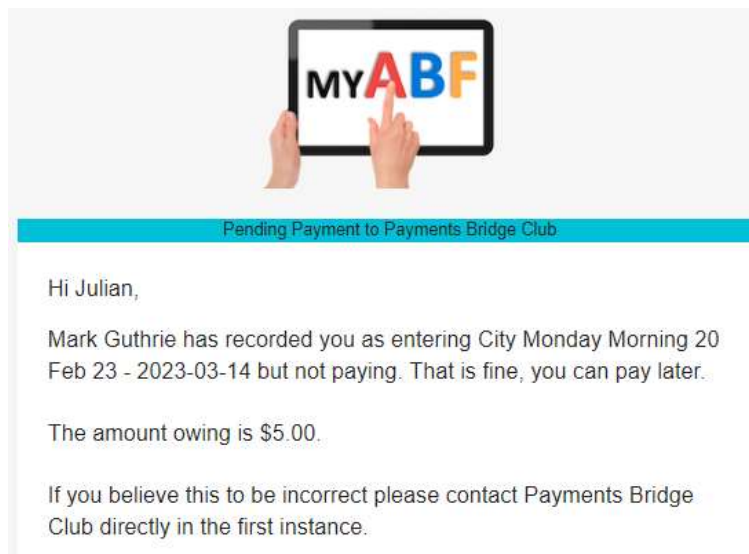
15.1. Auto top-up

If a payment triggers a player's automatic top-up (i.e. it takes the player's balance below \$20) the player gets an email confirming the Auto top-up has been successful (they also receive an email notification should the attempted auto top-up payment fail – perhaps because the stored card has expired).



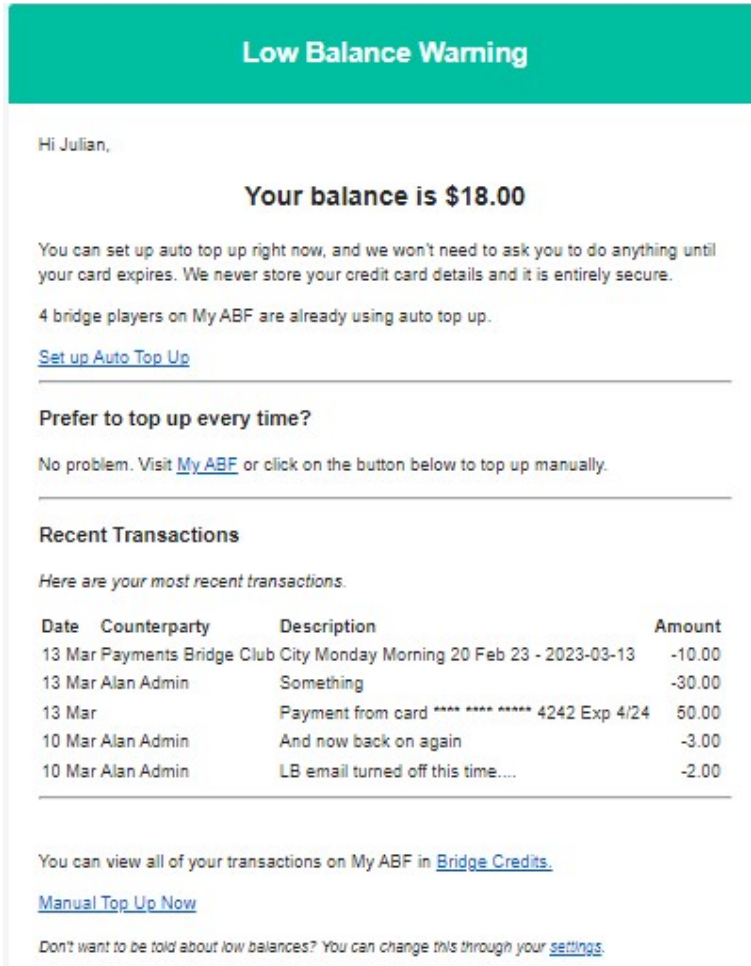
15.2. IOU

If a player doesn't have sufficient credits to pay for a session, a club has the option of setting up an "IOU" where the player can pay later. This is regarded as a "payment" for that session and leaves a debt to be collected later. The player will see a notification on their Dashboard about the outstanding amount. They also receive an email confirming this has happened:



15.3. Low balance warning

If a player doesn't have automatic top-up in place and a payment takes the player's balance below \$20 they will receive a low balance warning email with options to turn on automatic top-up or make a manual top-up:



Low Balance Warning

Hi Julian,

Your balance is \$18.00

You can set up auto top up right now, and we won't need to ask you to do anything until your card expires. We never store your credit card details and it is entirely secure.

4 bridge players on MyABF are already using auto top up.

[Set up Auto Top Up](#)

Prefer to top up every time?

No problem. Visit [MyABF](#) or click on the button below to top up manually.

Recent Transactions

Here are your most recent transactions.

| Date | Counterparty | Description | Amount |
|--------|--|--|--------|
| 13 Mar | Payments Bridge Club City Monday Morning | 20 Feb 23 - 2023-03-13 | -10.00 |
| 13 Mar | Alan Admin | Something | -30.00 |
| 13 Mar | | Payment from card **** * 4242 Exp 4/24 | 50.00 |
| 10 Mar | Alan Admin | And now back on again | -3.00 |
| 10 Mar | Alan Admin | LB email turned off this time.... | -2.00 |

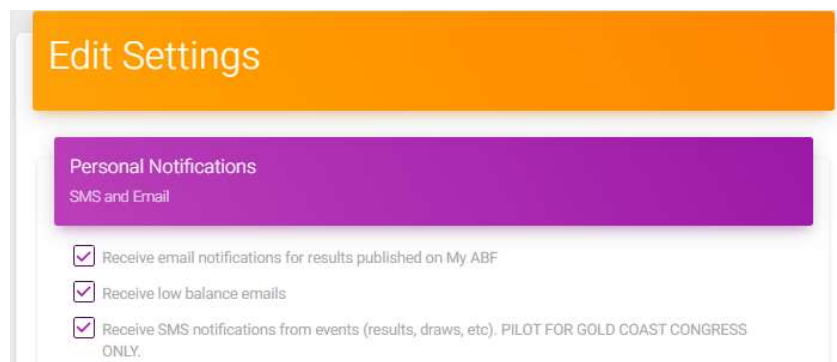
You can view all of your transactions on My ABF in [Bridge Credits](#).

[Manual Top Up Now](#)

Don't want to be told about low balances? You can change this through your [settings](#).

A player will continue to receive an email after each transaction where their balance remains under \$20 (although they will not receive one if the balance is zero).

It is possible to opt out of receiving Low Balance emails via a player's Settings page where there is a tick box option to disable them:



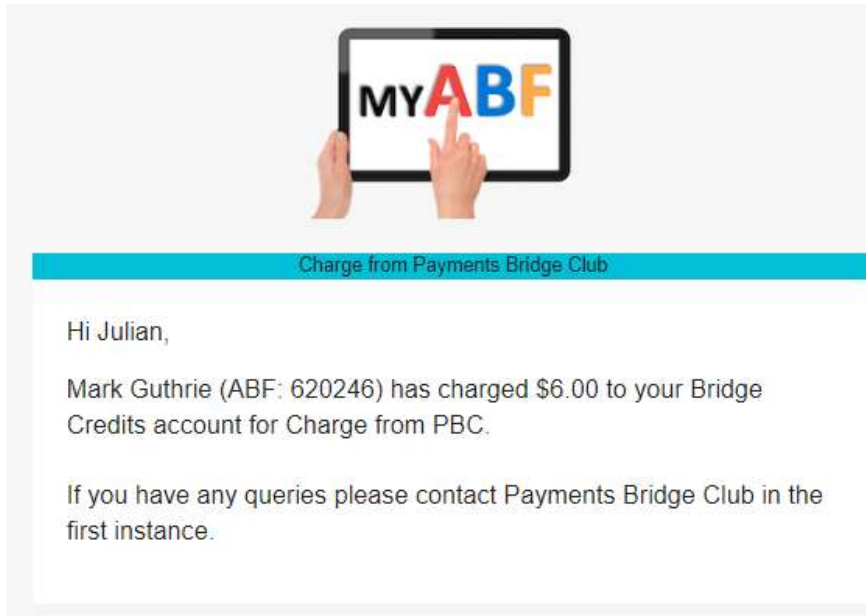
Edit Settings

Personal Notifications
SMS and Email

- Receive email notifications for results published on My ABF
- Receive low balance emails
- Receive SMS notifications from events (results, draws, etc). PILOT FOR GOLD COAST CONGRESS ONLY.

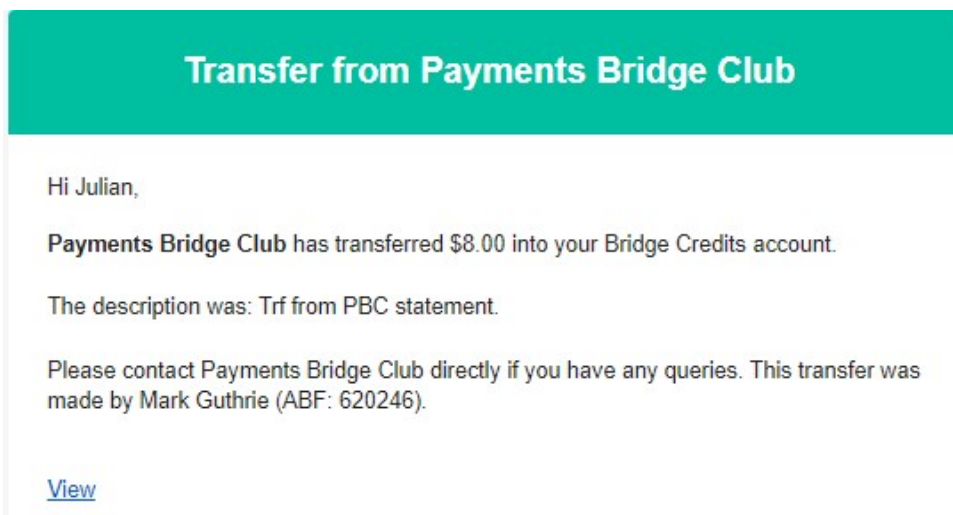
15.4. Additional charge

If a club makes a sundry charge to a player the player receives an email notification with the details.



15.5. Additional receipt

If a club makes a sundry transfer to a player the player receives an email notification with the details.



16. Reports

Reports are available throughout the process to show a quick snapshot of the session:

The screenshot shows a navigation bar with three tabs: SETTINGS (gear icon), SESSION (people icon), and REPORTS (document icon). Below the navigation bar, the word "Reports" is displayed. Underneath, there are seven green buttons: BASIC, FULL, PAYMENT METHODS, LOW BALANCE, MESSAGES, EXCEL DOWNLOAD, and CSV DOWNLOAD. The "BASIC" button is selected.

Table Fees

| Membership Type | Bridge Credits | Cash | IOU | Total |
|-----------------|----------------|-------|-------|--------|
| Life Member | 20.00 | 0 | - | 20.00 |
| Guest | 25.00 | 46.03 | - | 71.03 |
| Standard | 10.00 | 0 | 20.08 | 30.08 |
| Youth | - | 1.01 | - | 1.01 |
| Totals | 55.00 | 47.04 | 20.08 | 122.12 |

Extras

| Description | Bridge Credits | Cash | Credit Card | Total |
|-------------------|----------------|------|-------------|-------|
| Bridge book | 30.00 | 0 | - | 30.00 |
| Coffee | - | 0 | - | 0 |
| Top up of \$98.00 | - | - | 0 | 0 |
| Totals | 30.00 | 0 | 0 | 30.00 |

16.1. Basic and full report

The basic report (shown here) summarises the session table fees and extras by membership type (rows) and payment method (columns).

There are two variations of the primary report:

- Basic show the membership types and payment methods in use
- Full show all membership types and all payment methods

Where a red exclamation mark is shown, that indicates payment is not marked as complete for everything. Hovering over the area will display a pop showing what has been collected and what is outstanding for that item:



16.2. Payment Methods report

This shows a summary of payments by method – first for table fees, then for extras:

| Table Fees | | | | |
|----------------|--------------|-----------------|-------------|----------------|
| Payment Method | Players Paid | Players Un-Paid | Amount Paid | Amount Un-Paid |
| Bridge Credits | 5 | 0 | \$55.00 | |
| Cash | 7 | 7 | \$47.04 | \$51.07 |
| Credit Card | 1 | 0 | \$0.00 | |
| IOU | 2 | 0 | \$20.08 | |
| Free | 0 | 2 | \$0.00 | |

| Extras | | | | |
|----------------|-------------|----------------|-------------|----------------|
| Payment Method | Number Paid | Number Un-Paid | Amount Paid | Amount Un-Paid |
| Bridge Credits | 2 | 0 | \$30.00 | |
| Cash | 0 | 2 | \$0.00 | \$20.00 |
| Credit Card | 0 | 1 | \$0.00 | \$98.00 |

16.3. Low balance report

This shows a list of players with a Bridge Credits balance of under \$20.

It also shows players who have an account but have never used it.

Note that players automatically receive emails from the system when their balance is low (although they do have the option to disable these).

16.4. Messages

This shows any messages that were associated with the original file import process from CompScore.

16.5. Excel and CSV downloads

These allows you to download reports to Excel or csv. They show a full listing by player (both for table fees and extras) and also show the Payment method summary at the bottom.

17. Subsequent financial adjustments

If a mistake has been made with one or more player's charge for a session there are various approaches to correcting it:

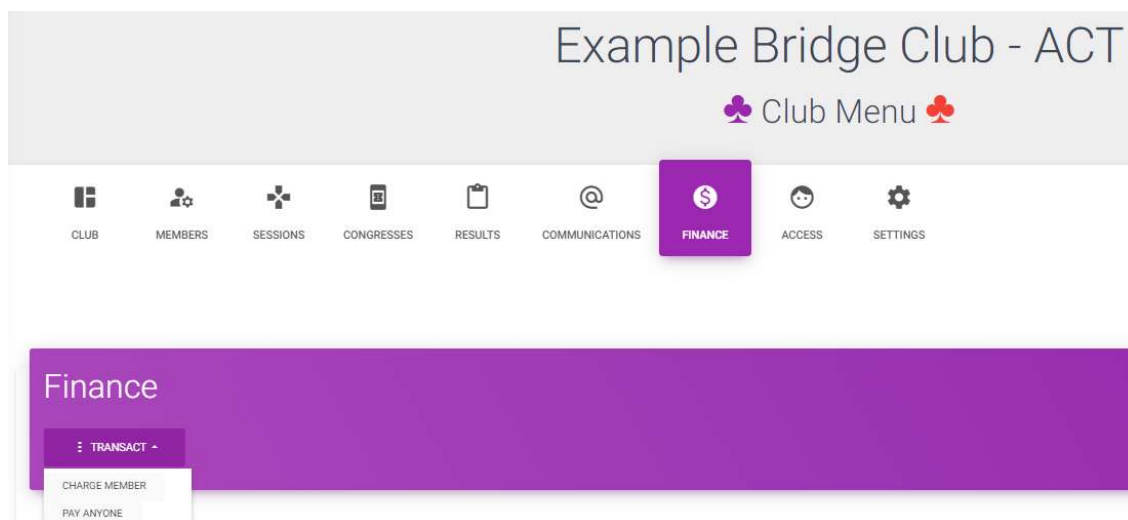
17.1. Edit the session

Even after a session is marked as complete it is possible to return to it and edit it. Adjusting amounts that were paid with bridge credits will give rise to a refund, and then a recharge when the session is re-processed. Players will see details of these adjustments in their Bridge Credits statements and will receive email notifications that they have occurred.

17.2. Make a sundry charge or payment from Finance

It is possible to make a sundry charge to a member or make a sundry payment to anyone via the Finance section of the Club Admin menu. Any transaction done this way is not linked to a particular session, it is listed separately.

These actions are accessed from the Transact button in the Finance menu:

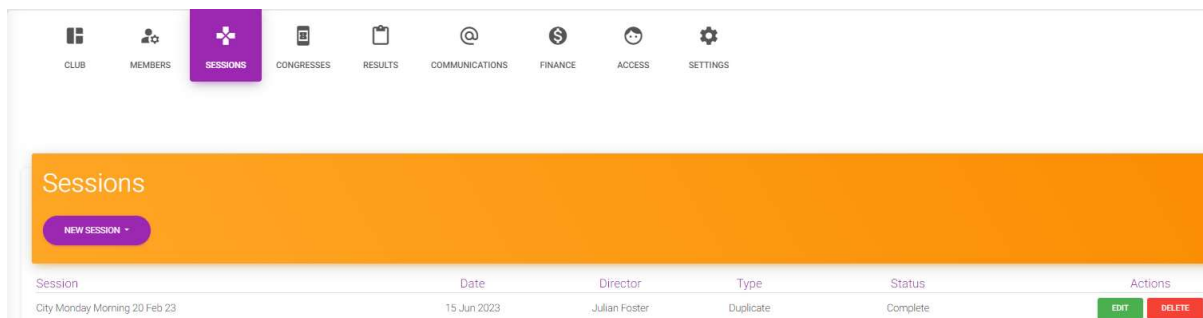


You can search for the relevant player(s) and make adjustments, including a description for each.

Players will see details of these adjustments in their Bridge Credits statements and will receive email notifications that they have occurred.

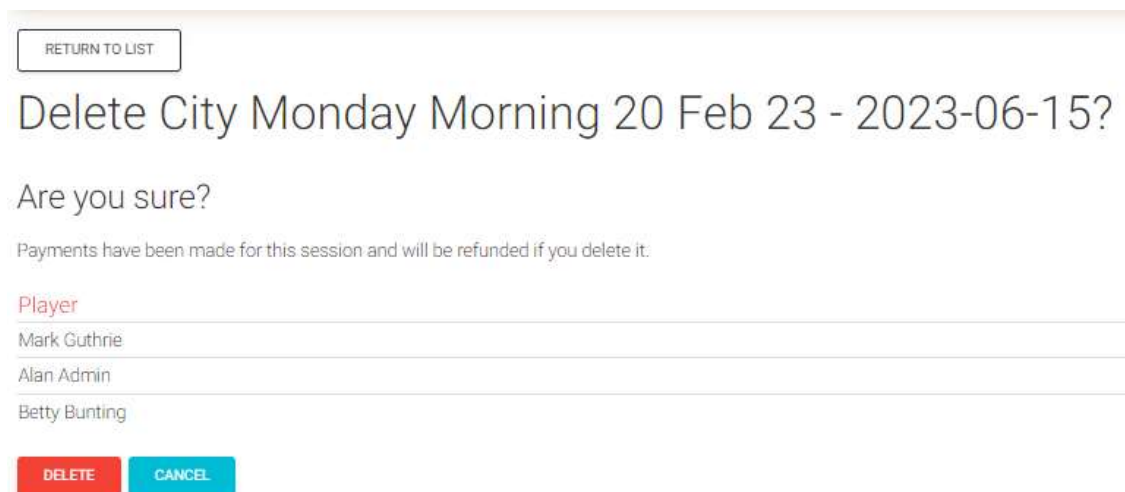
17.3. Delete the session and re-do

If something more major has gone wrong (for example the wrong session type has been used and everyone in the session has been charged the wrong amount) it is possible to delete the whole session and re-do it. This is only permitted, however, if there are no Extras within the session. If there are Extras, these need to be individually reversed first.



Find the session in question and click the Delete button.

If charges have already been made a warning will be presented first. If you proceed these will all be reversed in the players' accounts.



The session can then be re-imported and re-processed.

Once again players will be notified of the adjustments.

18. Overall financial reconciliation and settlement

18.1. Viewing the club's statement

Money collected in the form of bridge credits from players is credited to the club's bridge credits account. This is always visible in the Finance section of the Club Admin menu. Each player transaction is listed separately though so this means the club's statement can quickly become quite large.

It is therefore possible to filter and summarise the club's statement – both via a date range and type of transaction (bear in mind some clubs may have transactions arising from Club Sessions and from future Congress entries).

The functions and reports available are described in the Finance section of the main Club Admin user guide.

18.2. Settlement

The default position is for the ABF to review all club balances at the end of a calendar month and make settlement payments shortly thereafter. All club sessions that have been completed and all congresses that have started or completed will generally be settled (unless the club has specifically requested for this not to happen or has requested to keep a minimum balance in their account).

This procedure is not set in stone, however. It is possible for it to be varied. Some congresses may require interim settlements (e.g. to pay for a venue deposit). If clubs are running all their sessions via My ABF they may require a more frequent settlement for general cash-flow purposes.

Clubs are encouraged to talk to My ABF staff directly to discuss their needs.