



Release 3.1.15

CHANGES FOR CLUBS & TOURNAMENT ORGANISERS

This document describes the latest changes that are relevant for clubs & tournament organisers.

ITEMS RELEVANT FOR TOURNAMENT ORGANISERS

1. Display of event start times

When an event was run over multiple days and the start time was not the same each day, the system used to just display the start time of the last day in the entry list.

This has now been updated to specify the start time each day (where it is not the same throughout the event):

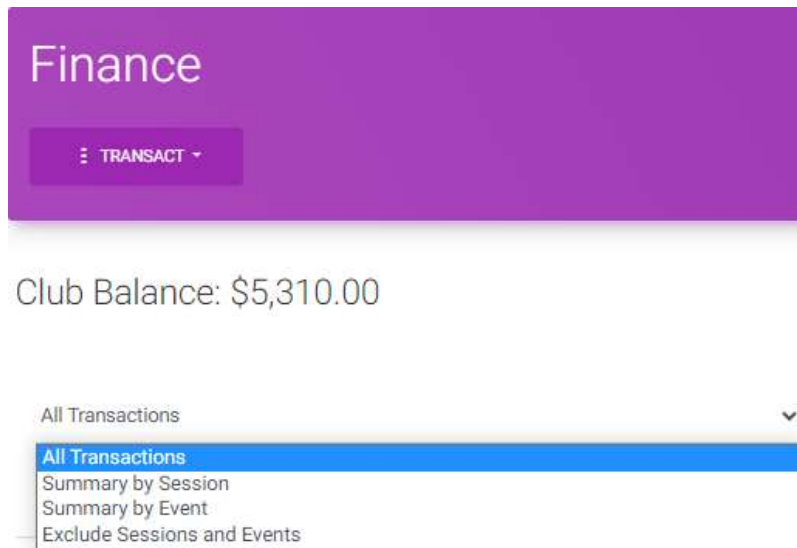
The screenshot shows a purple background with white text. At the top, it says 'GNOT Country Final 2023'. Below that, it says 'GNOT Country Final 2023' and '3rd to 4th June 2023 - 1pm Start'. A message states 'This event starts at different times on subsequent days'. A table follows with two columns: 'Date' and 'Start Time'. The table lists 'Saturday 3rd Jun 2023' with a start time of '1pm' and 'Sunday 4th Jun 2023' with a start time of '10am'. Below the table, it says '14 entries'. At the bottom, there are two buttons: 'ENTER' and 'CONGRESS DETAILS'.

ITEMS RELEVANT FOR CLUBS

2. Ability to summarise bridge credit statements

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.

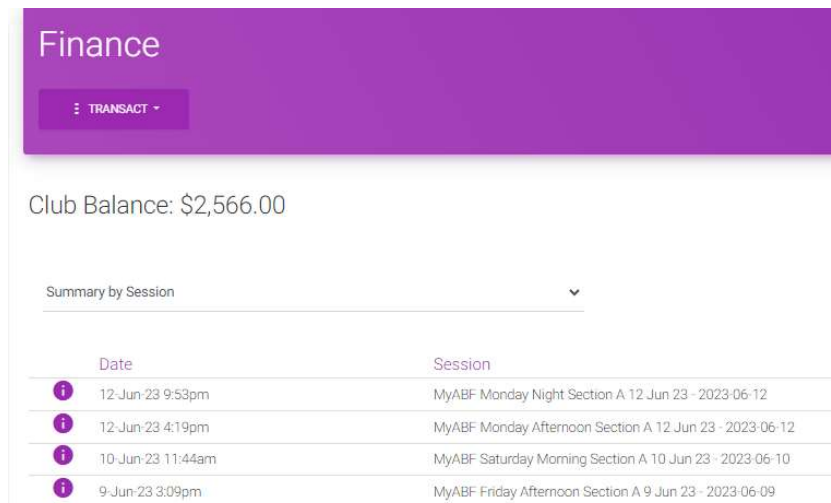
Under the Club Balance, there is a new drop-down selector allowing you to summarise the transactions by Session (relevant to clubs using the system for club session table money payments), by Event (relevant to clubs using the system for congresses) and to display all other types of transaction not associated 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.

2.1. Summary by Session

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



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

2.2. Summary by Event

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

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:

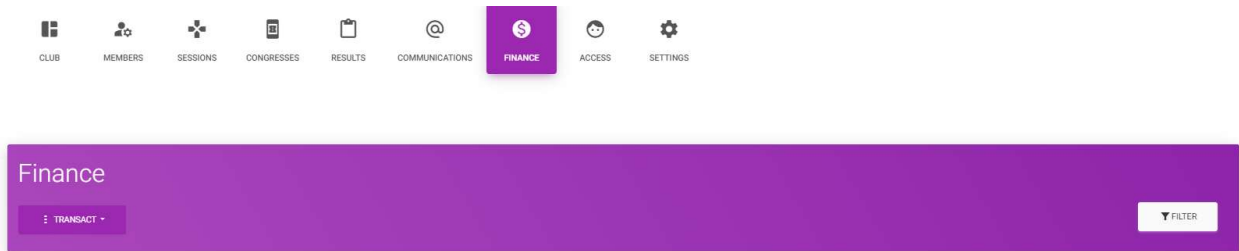
All Transactions for Test congress 2025 - Teams

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: 626096)	Julian Foster (ABF: 518891)	\$25.00
29-Jun-23 3:36pm	Teams - Julian Foster (ABF: 518891)	Julian Foster (ABF: 518891)	\$25.00

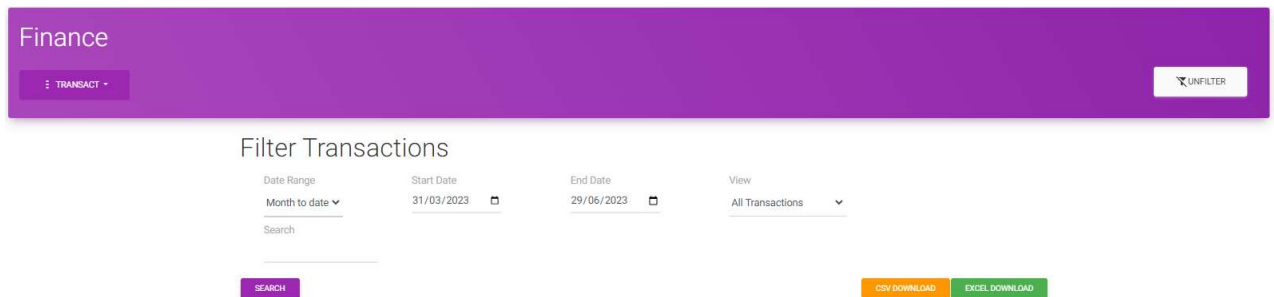
Click Show All to return to the summarised list.

3. Ability to filter bridge credit statements

It is now possible to filter a club's bridge credit statement. 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):

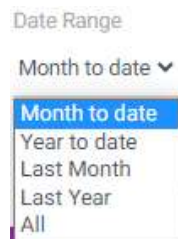


This provides a number of ways to filter the full statement.

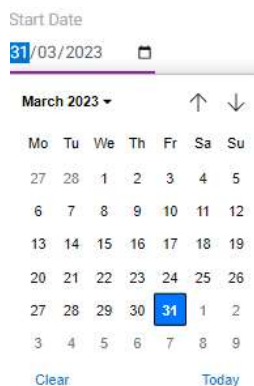
3.1. Filter by date range

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

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



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



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

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.



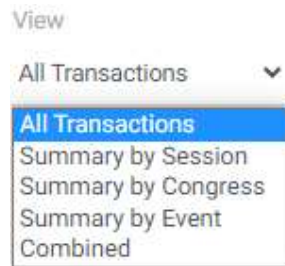
The screenshot shows a search interface with a search field containing 'julian'. Below the search field is a purple 'SEARCH' button. To the right are two buttons: 'CSV DOWNLOAD' (orange) and 'EXCEL DOWNLOAD' (green). Below these is a table with the following columns: Date, Description, Who, Amount, and Balance. The table contains four rows of transaction data.

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.

3.3. Filter by type of transactions

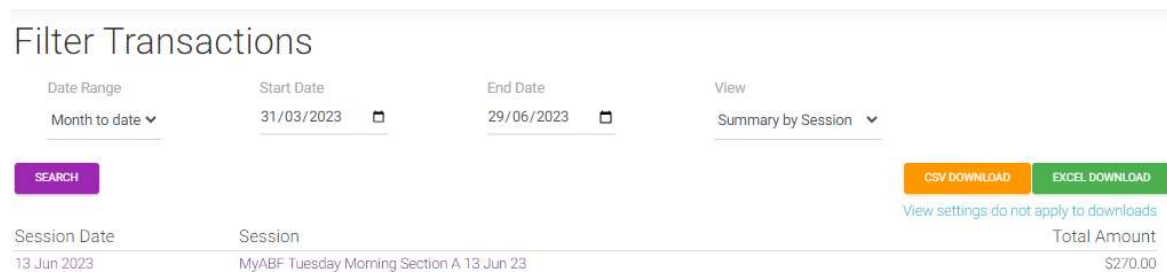
It is possible to filter the transactions by Session, Congress, Event or Combined.



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.

3.3.1. 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 includes 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 set to 'Summary by Session'. Below the filters is a purple 'SEARCH' button and two buttons: 'CSV DOWNLOAD' (orange) and 'EXCEL DOWNLOAD' (green). Below these is a table with the following columns: Session Date, Session, and Total Amount. The table contains one row of session data.

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.

3.3.2. 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 total of '\$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.

3.3.3. 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 'CSV DOWNLOAD' and 'EXCEL DOWNLOAD' button are also visible. A table is displayed with the following data:

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.

3.3.4. 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.

3.4. 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.

3.4.1. 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).

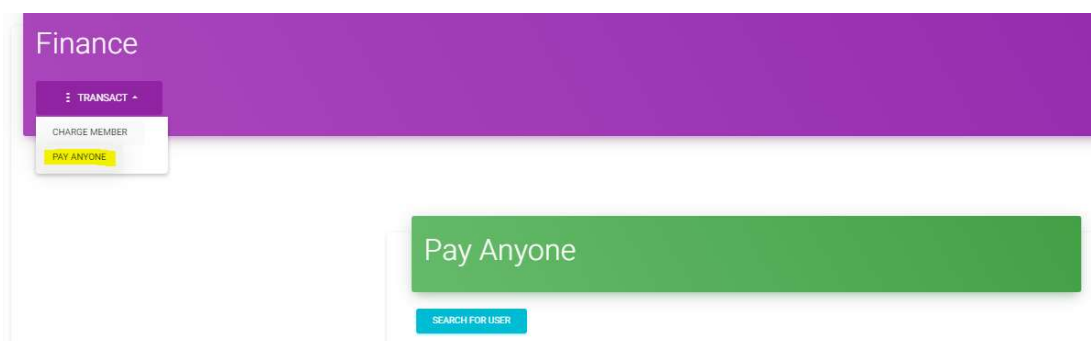
3.4.2. Excel download

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)

4. Ability to associate sundry club payments (e.g. prizes) to Events

When a club does a “Pay Anyone” transaction to transfer credits to a player there is now an option to associate that 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.



After searching for the player there is now an ability to select a Congress Event.

An event 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:

For example 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

Associate a transaction to a Session

Note that at this stage it is not possible to associate a “Pay Anyone” or a “Charge Member” transaction with a Session. Future functionality will accommodate separate post-session adjustments (both charges and refunds) and that will be handled within the Sessions area. Such adjustments will then automatically be part of the session for summarisation purposes.