FULL MEMBER MANAGEMENT – PART 1

GENERAL USER GUIDE

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1. Introduction

Having a list of your club members in My ABF is the key to being able to use many other areas of the system. For example:

- If you are going to use the Communications section to send emails to members or groups of members.
- If you run club sessions where players can be charged bridge credits. 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 you wish to run a Congress which is limited to members or to charge different entry fees for members and non-members.

Using the default Simple Member Management you can:

- Upload members (using whatever membership types you wish)
- Maintain details for those members
- Maintain (manually) dates for memberships (e.g. start date, end date, etc) & status.
- [In future] maintain home club member records for ABF capitation fee purpose (this is currently done through the ABF Masterpoint Centre)

But you can also use My ABF as your primary management tool for your members – known as "Full Member Management". This goes a lot further and allows you to track who is paid to what date, issue and process annual renewals, etc.

There are 3 guides covering the additional areas of My ABF for Full Member Management:

- General user guide to Full Member Management (this document)
- Creating annual renewals
- Managing memberships after the renewals have been sent

2. What does Full Member Management do?

In addition to the basic features Full Member Management allows you to:

- Maintain a historical record of memberships for each player – including different types, statuses, etc.
- Track relevant dates for memberships including when a member is paid to.
- Have the status of your members automatically update based on when they have paid, and to what date they have paid to.
- Issue membership renewals (individually or in bulk).
- Track incoming payments for membership.
- Facilitate collection of membership payments automatically through Bridge Credits.

If you are going to use Full Member Management then you will need to issue an annual renewal to your members – otherwise you will find the system will, at some stage (depending on the various dates set up) cause most of them to lapse.

This guide focuses on the additional aspects that are important for full membership management. Core parts of the membership functionality are covered in the main club membership guide.

3. Overall club membership settings

There are a few core settings that a club should complete to govern the way membership is managed.

3.1. Set your annual membership renewal date

The club specifies its annual renewal date within Settings – General:

Note this should be the FIRST day of your new membership year. So, for example, 1/1 (1 January) or 1/4 (1 April).

3.2. Select type of member management

Under Settings – General you can also tick whether you want to enable full member management or not.   It is assumed for this guide that that setting is ON.

3.3. Set up your membership types

You are likely to have already set up your membership types when you first added members to My ABF. My ABF starts with 3 default ones (Standard, Life Member and Youth). But you can edit these and/or set up any others ones you want at any time. The most common are life members, standard members and perhaps concession members. Some clubs also choose to set up "Home" and "Away" members as types.

This is done through Club Settings – Static Data – Memberships
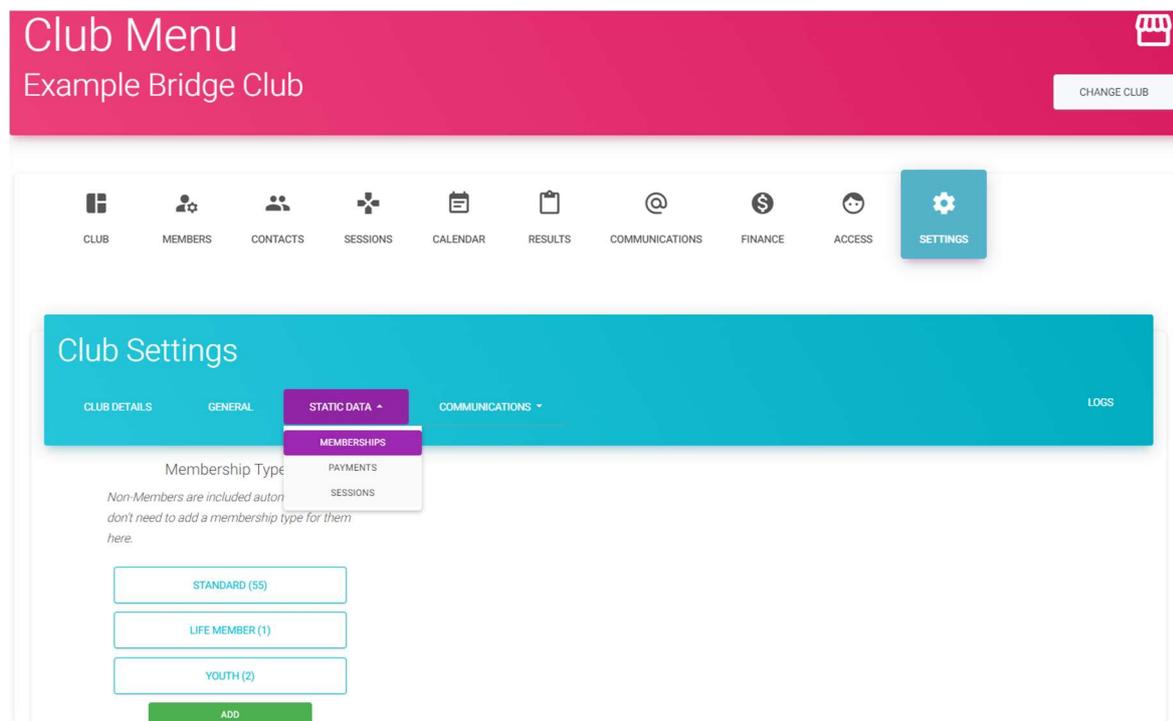
A Membership Type looks like this.
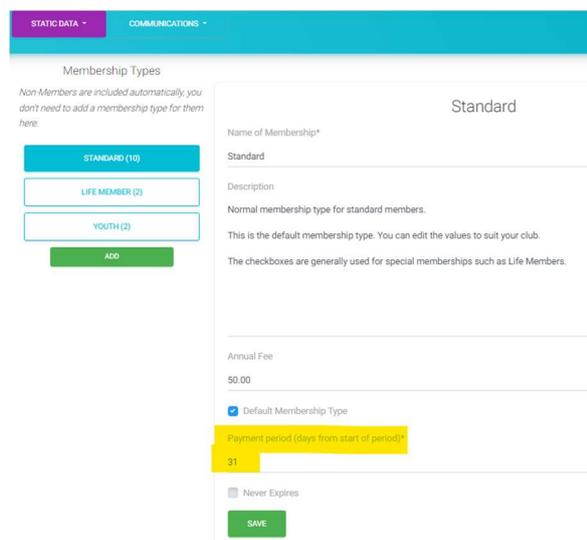
The aspects within a Membership type that are relevant to Full Member Management are:

3.3.1. Annual Fee

This is the annual fee a member of that type will be charged. Note this is a single figure – it is not split into ABF, State and Club components since that treatment is not universal around the country.

3.3.2. Payment Period

When a club sets up a Membership Type it has the option of putting in a "Payment period". This represents the length of time after the annual renewal date during which players can still pay before they lose their membership rights. It is sometimes also referred to as a "grace period".

So, for example, the default 31 days means that a club with a 31 December membership year end would be allowing members until 31 January to pay their membership renewals.

If your club requires payment of membership renewals before the end of the current period then you should put 0 for this.

The Payment Period is used in conjunction with the period end date to derive a "Lapse Date" – i.e. the date on which players who have not paid their renewal will have their membership formally lapse.

3.3.3. Never Expires

It is also possible to designate a membership as "Never expires" – this indicates the membership is perpetual (most commonly a life membership) and an annual renewal will not be generated.

All these items will have an impact on a membership renewal. They can be changed at that time but it's more convenient to set them up here first.

4. Membership details

4.1. Overview

Member information consists of two parts:

- Information about the membership
- Information about the member

The information about the member is the same regardless of whether Simple or Full member management is being used. Refer to the primary membership user guide for details on that.

Membership operates differently though. When using Full Member Management, My ABF maintains a membership record for a player – and this includes a new record each time the membership type changes or renews. This means a historical record of the membership will build up over time. It also maintains a lot of this automatically.

When you open the membership record for a player you see the Current membership record – older ones are hidden from this view (but can be opened using the Show Detail button – see 0 below).

The purple action buttons allow you to make various changes to the current membership record – either to change the status, renew, change the membership type (e.g. from Standard to Life or something) or delete.

4.2. Key components of a membership record

Each membership record has assorted data fields within it outlined below:

- **Membership Type** – This is one of the types set up by the club (see 3.3 above) and relates to the person. Common examples would be "Standard", "Concession", "Life", "Home", "Away", etc).
- **Membership Status** – This is the current state of this membership. Members transition between different states through time and based on whether they have paid. Described in more detail at 4.4 below.
- **Dates** – These describe the period itself and other dates that influence payment and continuity of the membership. Described in more detail at 4.3 below.
- **Payment aspects** – These describe the fee, if it was paid, when it was paid, and how it was paid.

4.3. Dates for a particular membership record

Each membership record can contain the following dates:

Dates	Explanation
Start and End dates	The start and end of the current period of membership (all memberships must have a start date, but those designated "never expires" such as life members do not have an end date).
Auto pay date	The date the club specifies it will charge annual membership renewals to members' bridge credits accounts (where members have indicated approval for this). Initially set to 7 days before the Lapse date.
Due date (referred to as Lapse date when doing renewals)	Arrived at by adding the payment period (specified in the Membership Type) to the annual renewal date (for example a 31 Dec renewal and a 31 day payment period would make this 31 January – that's the date at which unpaid members will have their membership lapse).
Paid date	The date the member paid for that membership period.
Paid until date	The period to which the member is paid up (usually the end of the current membership year).

4.4. Membership status and how it changes

A membership can have several statuses. These change over time as a result of actions by players or clubs. This is the key difference between Simple and Full Member Management. In Full Member Management My ABF manages some of these changes automatically.

There are 8 possible states for a particular membership record:

Status	Explanation
Current	Normal state – a current membership that has not yet expired.
Future	A membership to start in the future – created by a renewal.
Due	A membership with a period including the present date where money is still owing.
Ended	A former period of membership that has now expired.
Lapsed	A former membership that lapsed because the member did not pay by the Lapse date.
Terminated	A former membership which was terminated by the club.
Resigned	A former membership where the player resigned.
Deceased	A former membership where the player is now deceased.

There are several ways the status can change:

4.4.1. Changed as a result of a club's action

Clubs can change the status of a membership using the purple button. A new membership record is created for the remainder of the current year. After you have changed the status there is, however, a "Reinstate previous status" purple button that allows you to undo the last change (perhaps if it was done by mistake).

Use this to record a player's membership being terminated, a resignation, or to mark them as deceased. You can also mark a player as lapsed but that will usually happen automatically just based on time – see 4.4.3 below.

4.4.2. Changed as a result of a player's action

The most common example of this is when the player makes a bridge credits payment. That should automatically change a membership from "Due" to "Current"

4.4.3. Changed automatically by My ABF based on the date/payment status

Some status changes occur merely because of the date. Every night My ABF runs a check and will make the following updates automatically:

Scenario	Change made
A membership has reached its end date and no renewal has been issued.	Becomes lapsed.
A renewal for next year has been issued with a due date before the end of the current period (e.g. renew for 2026 calendar year – due for payment by 1/12/2025).	At the end of the current period. If the renewal has been paid then it becomes the current membership and the existing one is marked "ended". If the renewal has not been paid then it is deleted and the existing membership becomes lapsed.

Scenario	Change made
A renewal for next year has been issued with a due date after the end of the current period (e.g. renew for 2026 calendar year – due for payment by 31/1/2026). The club effectively gives a "grace period" for payment before member rights are lost.	<u>At the end of the current period.</u> If the renewal has been paid then it becomes the current active membership (it will have been marked as "future" prior to this) and the existing one is marked "ended". If the renewal has not been paid the existing membership is marked "Ended" and the renewal is marked "Due". <u>At the lapse date</u> If the renewal has already been paid then no action is required. If the renewal has not been paid then it is marked lapsed and its end date brought forward to the due date (effectively closing it at that point).

4.5. After a renewal has been created

If a membership renewal has been created this will show as a "Future" period above the current period. In that case there are some limitations on what you can do to the current membership.

4.6. Directly editing membership records

There is a Show Detail button at the top right. This will bring up a Manual Override column:

From here you can delete membership periods (except the current one) and directly edit the parameters for a particular membership period.

IMPORTANT NOTE: Directing editing membership records should not normally be necessary. It is possible to create some inconsistent situations and some unexpected results.   Care should therefore be taken. The purple action buttons are intended to be the primary means of processing day to day changes to memberships.

5. Renewals

There are two ways to renew members. It can be done individually for a member but the more common approach is likely to be a bulk renewal.

5.1.1. Individual member renewal

Use the purple Renew Membership button. The system will prompt you with the expected dates (usually the next 12 months) and fee. You can edit the fee and all the relevant dates here if required. You can also indicate whether you want to have a renewal notice emailed to the member and the content of any such email.

5.1.2. Bulk renewal

A club can commence a bulk renewal for one or more membership types. This is usually an annual function and is done from the Renewals option on the Member listing highlighted below:

This is a significant function. See Part 2 for a step by step approach to doing a bulk renewal.

6. Membership payments

Once a club has issued an annual renewal, the next step is for payments to start being collected.

Memberships can basically be paid in 4 ways:

- Player pays manually outside My ABF – club needs to update the record.
- Player pays manually with bridge credits.
- Club collects payment by bridge credits manually (rare).
- Auto pay is used to collect payment by bridge credits (see section 7 below for further explanation).

See Part 3 for details of how these operate.

7. Understanding Auto Pay for membership

7.1. What does it do?

Auto Pay is a facility where a Registered user of My ABF can have their annual membership payments deducted from their Bridge Credits account automatically on a set date. It is extremely convenient both for the players and the club.

7.2. Who can use it?

Only Registered users of My ABF who have their own account and have sufficient bridge credits in it (or who have Auto top-up enabled).

7.3. When does it take place?

The club sets a date on which it is going to attempt to take membership payments. This is advised to all members in the email sent out with the annual renewal.

It can be before or after the membership period end date – depending on your club policy in this area.

On the day in question payments will be attempted at 11pm Australian East Coast time (8pm West Coast time).

If a member has sufficient credits at the time (or has auto top-up enabled) the payment will go through on the specified date. The member will receive an email notification.

If a member doesn't have sufficient credits, the payment will fail. The system will continue to attempt to take payment on subsequent nights – either until it succeeds or until the date is changed by the club.

7.4. Can members choose whether to use it or not?

Yes. In a member's profile page they have a box they can tick to enable or disable Auto Pay for each club of which they are a member:

Note the default for this setting is ON. That means any member who does not want payment collected this way need to UNTICK this box. This is advised to players as part of the renewal email but it may also be something the club wants to specifically communicate.

7.5. Can the club see what's happened?

Yes.

Each time auto payments are attempted an email report is provided to the club. This summarises which payments succeeded, which payments failed, and for what reasons.

See Part 3 for details.