



FULL MEMBER MANAGEMENT – PART 2

CREATING ANNUAL RENEWALS

Last updated: Julian Foster 02/03/2026

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1. Overview

This document shows how to organise and issue your annual membership renewals in My ABF.

It assumes:

- Your club has already got its current members listed in My ABF
- Your clubs is already using Full Member Management.

Note that you need to have membership access for your club. If your club is using simple role based access control that will be anyone with access to this menu. If your club is using advanced role based access control, you need to be part of the group “Edit Member Info”. You can check this in the Access tab.

More information can be found in the overall Club Membership User Guide. This can be found in the Clubs page of the My ABF resources area on the ABF website: <https://www.abf.com.au/member-services/my-abf-resources/clubs/>

2. Key things to understand

Within My ABF a series of membership periods are stored for each member. Typically these are for a year at a time. That means a membership history builds up showing how long the person has been a member, how much they paid each period, when they paid, how they paid, and what membership types they have had. A log shows all this. Notes can also be added by the club.

It is utterly fundamental to understand when doing a bulk renewal in My ABF that ALL MEMBERSHIP PERIODS MUST BE CONTIGUOUS! So for example you have a current membership period ending on 31 December then the next one must begin on 1 January.

That will be the single biggest reason your bulk renewal might not pick up the members you think it should (see Troubleshooting in section 0 below).

If your club is using full member management My ABF runs some automatic processes nightly to handle payments and update the status of members in your membership list.

- At 11pm Australian Eastern time on an auto pay date it will attempt to collect payments automatically via bridge credits and provides a report summarising which ones succeeded and failed.
- At 3am Australian Eastern time it does checks which members have and have not paid and, if necessary, updates their membership status:
 - On a period end date it changes periods marked “Future” to “Current” (if paid) or “Due” (if unpaid and a grace period is in operation) and “Current” ones to “Ended”.
 - On a lapse date members not marked as paid are changed to a status of “Lapsed” (and a future period removed).

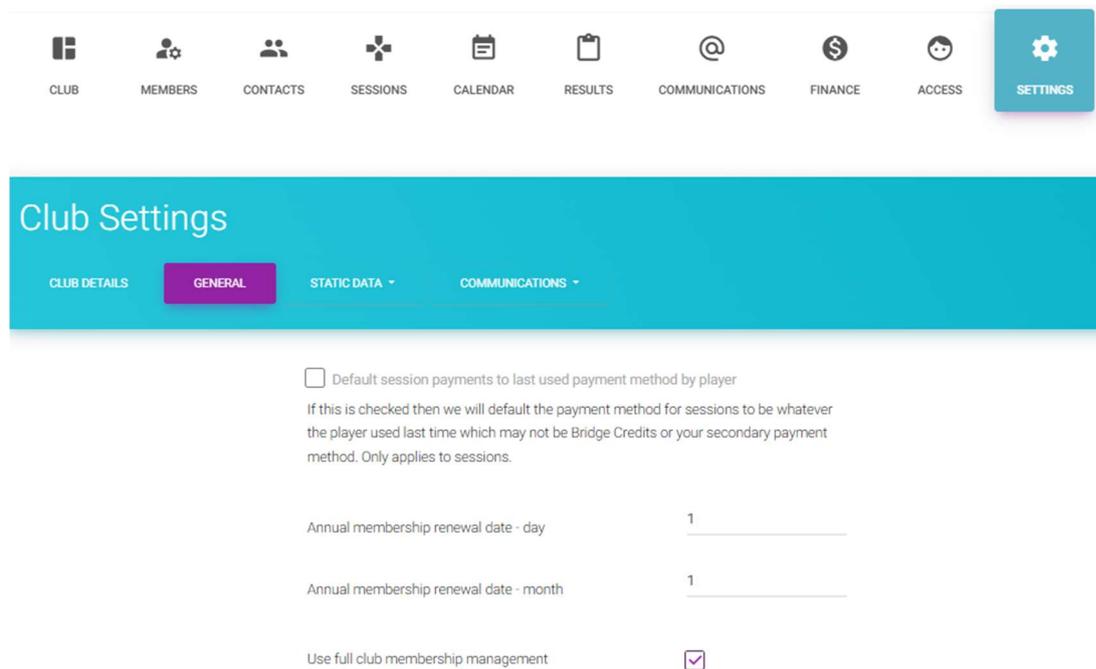
It is therefore important if you select “Full Member Management” in My ABF that you actually do use it! If you don’t issue a bulk renewal, sooner or later you will find all your members lapse! Then they will no longer be visible in your list (don’t worry they are still there – just shown as former members), given member table money in sessions, or member entry fee rates for tournaments, etc.

3. Things to do before starting a bulk renewal

All of these can be done directly at the time you do a bulk renewal but it is much easier to set them in advance and minimise the number of changes you then have to make.

3.1. Check your annual membership renewal date

The first thing to check is that the annual membership renewal date for your club is correctly set. This is in Settings - General:



1. “Use full club membership management” should be ticked.
2. Also check the day and month. They should be the FIRST DAY OF THE NEW PERIOD. So this example club has a calendar year membership period so the 1st day of the new period is 1 January (you don’t specify a year here). A club with a 31 March period end should have 1 & 4 here (i.e. the 1st day of the new membership year is 1 April).

3.2. Check your membership fees and payment periods

These are both set within the Membership Types within Settings – Static Data – Memberships:

The screenshot shows the 'Club Settings' interface with the 'Static Data' tab selected. Under 'Membership Types', there are four options: LIFE (5), YOUTH (0), HOME (289), and AWAY (42). The 'HOME' type is selected. On the right, the details for the 'Home' membership type are shown. The 'Annual Fee' is set to 65.00 (highlighted in green) and the 'Payment period (days from start of period)' is set to 31 (highlighted in yellow). The 'Default Membership Type' checkbox is checked.

For each membership type (apart from ones like Life which never expire) there are two things to check here:

3.2.1. Annual Fee (Green highlight)

This, fairly obviously, is what will be charged to players with that membership type. It will usually vary between different types the club has (e.g. “Full” / “Concession”, “Home” / “Away”, etc). Note that this is a single \$ figure. It does not automatically include a club, state and ABF component because that treatment is not universal across the country.

3.2.2. Payment Period (Yellow highlight)

This determines any “grace period”. It represents a number of days after the year end and drives the initial Auto pay and Lapse dates that display (you can still edit them at the time you start the renewal).

So this example one is set to 31 days (the default value the system suggests when a membership type is created). That means for a calendar year renewal it will give 31 days “grace” (i.e. until 31 January) and start with an Auto pay date and a Lapse date of 1 February.

That means members will remain “current” through to that date and will lapse if they remain unpaid at that point.

If your club requires payment on by the end of the current period, you should set this Payment period to 0 days. But understand that means any members who have not paid by the period end will lapse at that time.

3.3. Decide the key dates for your club

Not all clubs manage membership the same way:

- Some clubs require membership to be paid BEFORE the new period starts. Members who haven't paid by that date have their membership lapsed at the period end.
- Some clubs allow a grace period and require membership to be paid until some time AFTER the new period starts. The current membership only lapses if it isn't paid by that date.

Besides the obvious dates of the membership period (which will default to being 12 months from the start date in your settings), you need to set the "Auto Pay" and the "Lapse" dates for your club. It is important to understand what they both mean.

3.3.1. Auto Pay Date

This is the date you WANT people to pay by – and when you will tell them their membership is due by. However, if they don't actually pay by that date, nothing happens (yet).

It is also the date you will seek to collect membership payments automatically via bridge credits. You generally want this to be EARLIER than the lapse date. That's to allow for time to fix problems before a member formally lapses (invariably when you try to collect payment there will be members who, despite agreeing to it, will not have put enough credits in their account so their payment will fail!) That's why by default it is set to 7 days before the Lapse Date.

3.3.2. Lapse Date

This date is very important. It's the date on which, if a member still hasn't paid, their membership will formally lapse. They will be removed from your club list as a current member. That means they will no longer qualify for member table money or member entry fees to events and will no longer be included in the list of current members to send emails to, etc. This date is derived, for each Membership Type, from the Period end PLUS any "Payment Period" you specified in the Membership Type setup (see 3.2.2 above).

You can change Auto Pay and Lapse date for every membership type at the time you issue the bulk renewal if you wish (and in fact after the renewal has gone out as well). You can see how in section 5.1 below.

3.4. Examples of key dates for common year ends

My ABF creates default values for the two key dates which are:

- LAPSE DATE = PERIOD END PLUS PAYMENT PERIOD
- AUTO PAY DATE = LAPSE DATE MINUS 7 DAYS

Therefore here are some examples for two common year ends (31 Dec and 31 Mar). In the first example we are assuming the club is giving a 31 day “grace period” – so their payment period is set to 31 days. In the second example the club is not giving any grace period so their payment period is set to 0.

This leads to the following timelines being initially created by My ABF:

CLUB ALLOWING A 31 GRACE PERIOD FOR PAYMENT AFTER THE MEMBERSHIP YEAR END				
Period start	Period end	Auto Pay	Lapse	
1-Jan	31-Dec	24-Jan	31-Jan	
1-Apr	31-Mar	24-Apr	1-May	

CLUB NOT ALLOWING A GRACE PERIOD AND REQUIRING PAYMENT BY THE MEMBERSHIP YEAR END			
Period start	Auto Pay	Period end AND Lapse	
1-Jan	24-Dec	31-Dec	
1-Apr	24-Mar	31-Mar	

NOTE. These are INITIAL DEFAULTS created by My ABF. All of these dates can be changed when you create a bulk renewal (or even afterwards).

So it’s perfectly possible to do something like this if you want:

CLUB SEEKING PAYMENT 1 MONTH BEFORE THE MEMBERSHIP YEAR END BUT STILL ALLOWING A 31 GRACE PERIOD AFTERWARDS				
Period start	Auto Pay	Period end	Lapse	
1-Jan	30-Nov	31-Dec	31-Jan	
1-Apr	28-Feb	31-Mar	1-May	

4. Review your current membership list

It is strongly recommended that before you start a bulk renewal you should look at your current membership list and, in particular, check the membership periods currently in existence. Bear in mind that only members with a latest period described as current which ends the day before your new period will be included in a bulk renewal.

4.1. How to check

There are two ways you can review your current members - in the system or by exporting a csv listing. For medium to large clubs the latter is likely to be easier to look across all the members together rather than check them individually.

4.1.1. Option 1 - Export a list of current members to csv

This can be done via the Reports link to the right of the Member screen:



Select the Current members button which will export a csv of all your current members.

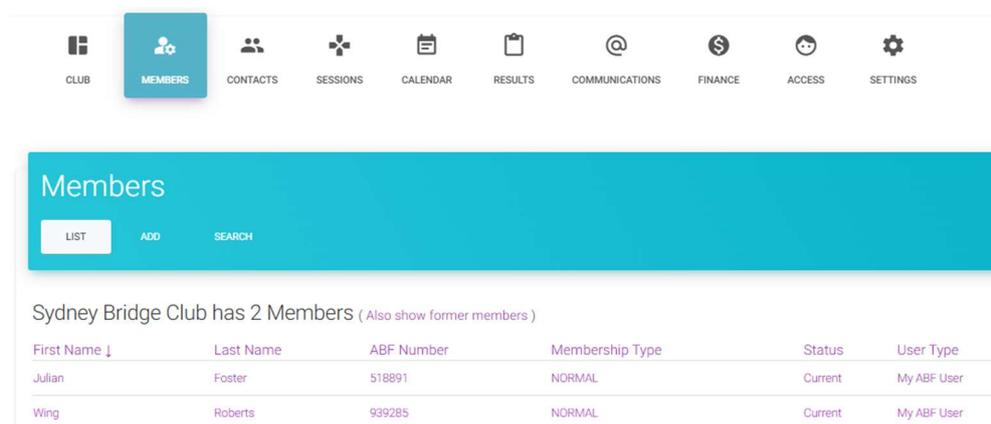
Within that sheet the key columns are Membership Start Date and Membership End Date (columns R & S) – this example has hidden columns D to Q.

A	B	C	R	S	T
Sydney Bri	Download	2026-02-16 23:45:13.177459+00:00			
ABF Num	First Nam	Last Nam	Membership Start Date	Membership End Date	Membership Status
1137859	Alan	France	1/01/2026	31/12/2026	Current
939285	Wing	Roberts	1/01/2026	31/12/2026	Current
687111	Alison	Smith	16/02/2026	31/12/2026	Current
65617	David	Weston	1/01/2026	31/12/2026	Current

4.1.2. Option 2 - Review members in the system

Although reviewing a single csv file containing all members is likely to be easier, it's also possible to individually look at members in the My ABF listing.

The list of your current members is displayed in the Members tab of your club admin menu:



Make a note of how many members are displayed here. Apart from life or other special membership types, this is how many you would expect to be included in a bulk renewal.

To select an individual member you can click on their name (provided you have membership access rights for your club) and this will open a screen like this:

Members

LIST ADD SEARCH

Julian Foster - ABF:518891 (Balance \$181.15)

Membership Details

Current membership: NORMAL, paid until 31-Dec-25

Type	Status	From	To	Fee	Paid by	Due
NORMAL	Current	01/01/2025	31/12/2025	95.00	Bridge Credits	

Actions: CHANGE STATUS - RENEW MEMBERSHIP CHANGE MEMBERSHIP TYPE REMOVE MEMBERSHIP

SHOW DETAIL

It will show the latest membership period (in bold). You can click the Show Detail button to expand this to show earlier periods.

The “To” date is the key one to look at. When it ends on 31/12/2025 that means this member will be included in a bulk renewal starting from 1/1/2026.

4.2. What to look for

4.2.1. Inconsistent End Date

Suppose you are starting a membership renewal for a period beginning 1 Jan 2027. If you find a member listed that does NOT have a membership end date of 31 Dec 2026 then that person will not get included in the bulk renewal.

That might be legitimate (perhaps some special membership deal was available when they were added?) or it might be an error made at the time you added the member. If it is an error then you can go to the member and amend it.

4.2.2. Earlier period being shown

If the period shown for a member is not the latest year (for example it might be 1 Jan to 31 Dec 2025 not 1 Jan to 31 Dec 2026) then this will also mean that person won’t get included in the bulk renewal.

This is likely to be an error relating to the period the system is regarding as the active one.

For more details on these issues and how to address them see Troubleshooting in section 0 below.

5. Prepare the Bulk Renewal

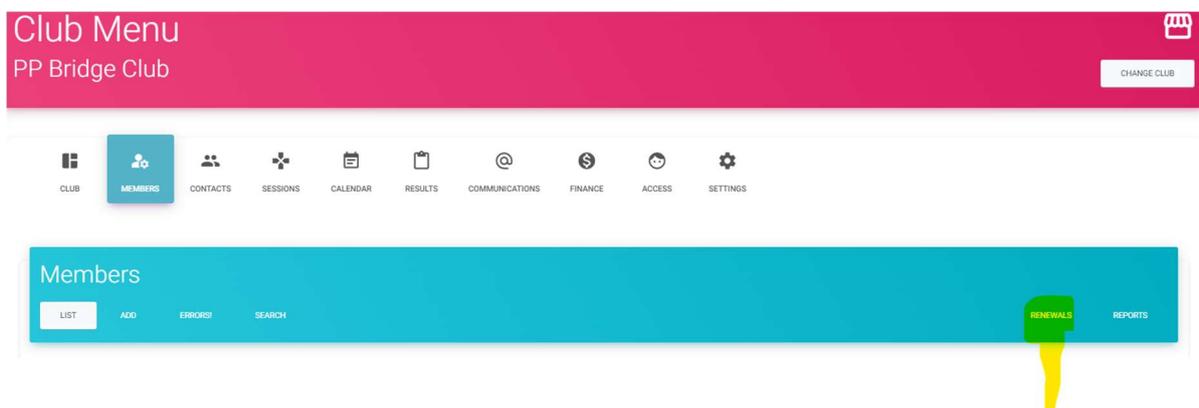
There is a three step process to creating the bulk renewal. It is possible to return to earlier steps if you need to before actually initiating the renewal.

IMPORTANT: You should take a lot of care when doing this. It is a major function which is usually only done once a year. For large clubs it may impact hundreds of members. It's not something you can simply undo afterwards.

5.1. Step 1: Member types, amounts, dates, email wording

A club can commence a bulk renewal for one or more membership types at a time.

This is done from the Renewals option on the Member listing highlighted below:



This brings up a screen where you select which membership type(s) you want to include in the renewal and various other parameters.

Initiate Bulk Renewals

1 Options 2 Members 3 Process

Select the membership types to include in this renewal. Edit the dates and fee here if required.

Include	Membership type	From	To	Fee	Auto Pay on	Lapse Date
<input checked="" type="checkbox"/>	NORMAL	01/01/2027	31/12/2027	95.00	05/01/2027	01/02/2027
<input type="checkbox"/>	PERPETUAL	01/01/2027	31/12/2027	0	01/02/2027	01/02/2027
<input type="checkbox"/>	SPECIAL	01/01/2027	31/12/2027	0	01/02/2027	01/02/2027
<input checked="" type="checkbox"/>	CONCESSION	01/01/2027	31/12/2027	65.00	05/01/2027	01/02/2027
<input type="checkbox"/>	COUNTRY	01/01/2027	31/12/2027	65.00	01/02/2027	01/02/2027

Select the details for the renewal notices to be send to the selected members:

Send renewal notice emails

Club template -

Subject Membership Renewal

Email content (use HTML tags to include formatting, blank lines, links etc)
Thank you for your continuing membership. Please find your renewal details below

In the first section select which membership type(s) you want to include in the renewal. You might do them all together or you might just do one or two (e.g. if you want different email wording for different types).

The Fee, Auto pay and Lapse date presented here are created as defaults from the settings already in place (as described in section 3 above). But you can edit them on this screen if you wish.

You can then:

- a) Select whether you wish to send a renewal email out (the default is yes).
- b) Select a club email template (if any) to be used for the email.
- c) Add wording for the renewal email. Note that a lot of the basic details for the amounts, dates and payment methods are completed automatically by My ABF so your wording doesn't need to include any of that, only a preamble. See next section for an example of the email.

When ready click "Proceed to Members" at the bottom left.

It might be a good idea to initially test this by selecting all the member types and checking on the next screen how many members get included (it should be the total members you identified when you looked at your overall list earlier). If it isn't, you may need to investigate why some members are not being included. See Troubleshooting at section 0 below.

5.2. Step 2: Review the included members

Step 2 shows the members that will be included in the renewal – i.e. those which have been identified as having a current period of membership ending the day before the proposed renewal period will start.

Initiate Bulk Renewals

1 Options 2 Members 3 Process

Summary:

Members selected:	3
Members without email addresses:	0
Members allowing auto pay:	2
Total membership fees:	\$285.00
Auto pay fees:	\$190.00

Note: The auto pay figures above are based on the current user permissions. Registered user members can change their auto pay permissions at any time.

Name	ABF Number	Membership Type	User Type	Fee	Allow Auto Pay	Action
Wing Roberts	939285	NORMAL	My ABF User	\$95.00	Blocked	PREVIEW
David Weston	65617	NORMAL	My ABF User	\$95.00	05/01/2027	PREVIEW
Julian Foster	518891	NORMAL	My ABF User	\$95.00	05/01/2027	PREVIEW

Please select a member to review an example email for before processing these renewals.

PROCEED TO PROCESS CANCEL

The top section summarises the number of members included. It will indicate if there are any included without an email address recorded (for which a renewal can still be generated in the system but it will need to be sent to the member another way).

The bottom section gives a list of all the members to be included in the bulk renewal – and, for the Auto Pay column, show if they have blocked it or can't use it (i.e. are not a registered My ABF user).

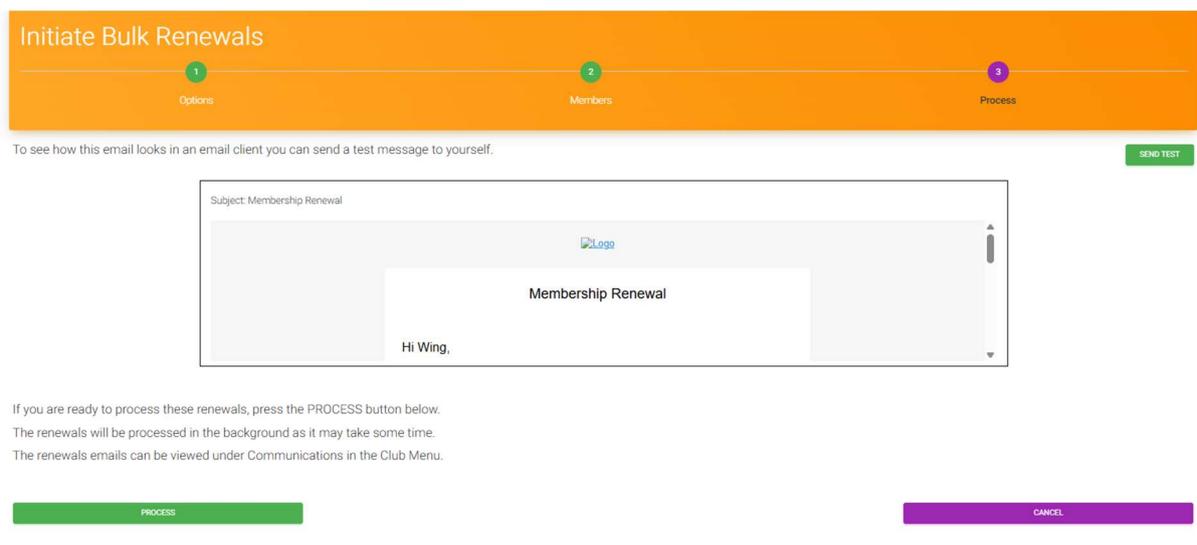
You can then also preview the draft email for any member.

Clicking the Green step 1 in the header will take you back to step 1.

Clicking the green Proceed to Process button will take you to the next step.

5.3. Step 3: Review (& test) the email and process the renewal

After previewing an email, or by clicking Proceed to Process at the previous step you will be taken here.



Initiate Bulk Renewals

1 Options 2 Members 3 Process

To see how this email looks in an email client you can send a test message to yourself. [SEND TEST](#)

Subject: Membership Renewal



Membership Renewal

Hi Wing,

If you are ready to process these renewals, press the PROCESS button below.
The renewals will be processed in the background as it may take some time.
The renewals emails can be viewed under Communications in the Club Menu.

[PROCESS](#) [CANCEL](#)

Here you can again preview an email and you can send a test email to yourself.

This is an example email:

Membership Renewal

Hi Julian,

Thank you for your continuing membership. Please find your renewal details below

Renewal Details:

Club:	Sydney Bridge Club
Membership Type:	NORMAL
Period:	1 Jan 2027 to 31 Dec 2027
Fee:	\$95.00
Auto pay:	5 Jan 2027
Lapse Date:	1 Feb 2027

You can pay your membership fee using Bridge Credits by going to your [My ABF profile page](#) and clicking the 'Pay Now' button for this renewal in the Club Memberships section.

The club will attempt to pay your membership using Bridge Credits on 5 Jan 2027 if it has not been paid by that time. If you would like to pay this way please ensure that you have sufficient Bridge Credits in your account or have auto top-up enabled.

You can prevent automatic payment with Bridge Credits by changing your permissions for this club on your [My ABF profile page](#) before 5 Jan 2027.

Your membership is due for payment by 5 Jan 2027. Note that your membership will lapse if it remains unpaid on 1 Feb 2027.

The section at the top of the email comes from the wording you created yourself at step 1.

The remainder is generated automatically by My ABF showing the basic parameters about the renewal. The wording at the end varies depending on:

- Whether the member is a registered My ABF user (who can use bridge credits to pay) or an unregistered user (who can't).
- Whether the member has chosen to block Auto pay or not.

The final paragraph reminds the member that their membership is due by the Auto pay date but it will only formally lapse if they still haven't paid by the Lapse date (normally set to a bit later).

You can click the green circles in the header to return to either of the previous steps.

When you are ready to process the renewal click Process. There will be one final confirmation required.

FINAL WARNING: YOU CANNOT UNDO THIS ONCE YOU KICK IT OFF. CHECK EVERYTHING AGAIN!

For a large club a bulk renewal could involve several hundred members. The process therefore goes on in the background.

6. Initial outcome after the bulk renewal

Renewal emails will be sent to the members and a new membership period for the relevant period is created in their records (usually marked “Future” if it’s done in advance of the current period end).

That means a member record will now look something like this:

Julian Foster - ABF:518891 (Balance \$86.89)

Current membership: NORMAL, paid until 31-Dec-26, 95.00 membership fees to pay SHOW DETAIL

Type	Status	From	To	Fee	Paid by	Due
NORMAL	Future	01/01/2027	31/12/2027	95.00		01/02/2027
NORMAL	Current	01/01/2026	31/12/2026	95.00	Bridge Credits	

Actions: CHANGE STATUS - MAKE PAYMENT REMOVE MEMBERSHIP

The current membership is shown in bold as before but there is now a “Future” membership that has been created ready for the next period. It shows the amount due and the lapse date (under the “Due” column to the far right).

Amounts not yet paid are shown in red with no method showing under “Paid by”.

Amounts paid are shown in black with the payment method also completed (although note that the first time you use My ABF for membership this will not be complete for your existing year – you can consciously add it for completeness if you want but it’s not necessary to do so).

That completes the initial generation of a bulk renewal. You may wish to then repeat it for different membership types if you haven’t included them all together. You might do this, for example, if you want different email wording for different types.

Read Part 3 for assistance on how to manage subsequent payments from members, chase up those who haven’t paid, and track how the system processes the auto pay facility.

7. Troubleshooting – before doing a bulk renewal

Because it's possible (but not advisable!) to manually edit membership periods it is possible for scenarios to arise which prevents some members being included in a bulk renewal that you want to include.

These tend to be because:

- A membership period does not end the day before the proposed renewal period
- A membership period does end the day before the proposed renewal period but it is not marked as active for that member.

The active membership period should always be shown in bold on a player's membership screen. Usually it should also be the only one listed there.

The following are examples of these reasons why a member is not being included in a renewal.

7.1. Non-contiguous membership end period

The player has a membership with a latest period that does NOT end the day before the intended new period. For example:

Julian Foster - ABF:518891 (Balance \$61.15)

Current membership: NORMAL, paid until 31-Dec-25 [SHOW DETAIL](#)

Type	Status	From	To	Fee	Paid by	Due
NORMAL	Current	01/01/2025	01/12/2025	95.00	Bridge Credits	

Actions: [CHANGE STATUS -](#) [RENEW MEMBERSHIP](#) [CHANGE MEMBERSHIP TYPE](#) [REMOVE MEMBERSHIP](#)

It may be possible to manually edit the period (click Show Detail to expand all the membership records for the player and then directly edit the latest one to change the end date).

7.2. More than one membership marked as current

If, somehow, a player has more than one membership marked as Current this can cause problems with picking them up for a bulk renewal.

Ruth Sargent - ABF:655465 (Balance \$5.00)

Current membership: Away, paid until 31-Dec-25 [SHOW DETAIL](#)

Type	Status	From	To	Fee	Paid by	Due
Away	Current	01/01/2025	31/12/2025	28.00	Bridge Credits	
Away	Current	15/04/2024	31/12/2024	-		

Actions: [CHANGE STATUS -](#) [RENEW MEMBERSHIP](#) [CHANGE MEMBERSHIP TYPE](#) [REMOVE MEMBERSHIP](#)

Again it may be possible to edit the period directly to change the status of the old one from Current to "Ended".

7.3. Incorrect active period

The membership period for a player that the system thinks is the current active one is always shown in bold. That is the one it will check to see if it ends the day before the proposed renewal period.

If this isn't in fact the active period then it won't be included in a bulk renewal. The example above also contains this problem:

Wing Roberts - ABF:939285 (Balance \$88.72)

Current membership: NORMAL [SHOW DETAIL](#)

Type	Status	From	To	Fee	Paid by	Due
CONCESSION	Current	01/01/2026	31/12/2026	-		15/08/2027
NORMAL	Current	03/10/2025	31/12/2025	-		15/08/2027

Actions: [CHANGE STATUS -](#) [MAKE PAYMENT](#) [RENEW MEMBERSHIP](#) [CHANGE MEMBERSHIP TYPE](#) [CHANGE ACTIVE MEMBERSHIP](#) [REMOVE MEMBERSHIP](#)

This member will NOT be included in a bulk renewal starting on 1/1/2027. Because the "active" membership period (according to the system) is the one shown in bold and that ends 31/12/2025. Yes even though there is another period there which DOES end on 31/12/2026.

You can use the Change Active Membership button to fix this. That allows you to select another period marked as Current.

After selecting it, check what period is shown in Bold. That will be the one marked as Active.