CLUB ADMINISTRATION – USER GUIDE

Last updated: Julian Foster 28/05/2026

Release: 6.3.21

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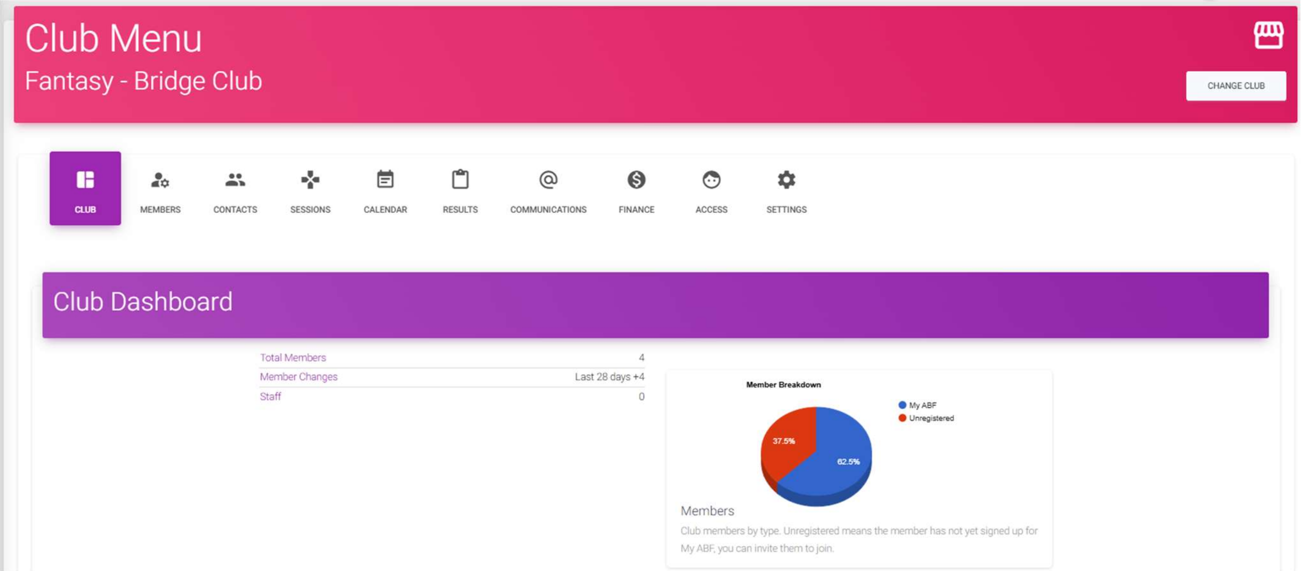
1. Overview

1.1. Club Admin functions

My ABF contains a series of administrative functions for clubs. There is a Club Admin menu which looks like this (not every user will see all these parts – see section 3 below for more details):



The 10 primary areas are described below and in what section of this document they are covered:

Main Menu Item	Description	Section
Club	Dashboard showing high level information about your club and its members.	4
Members	Import and maintain a list of your members.	5 (*)
Contacts	Import and maintain a list of contacts.	6 (*)
Sessions	Create sessions, import players, generate financial reconciliation and bridge credit charges.	7 (*)
Calendar	Set up and manage Series for events. Set up and manage event listings.	8 (*)
Results	Upload session results for display to players.	9
Communications	Send emails to members or tagged groups of members.	10
Finance	Access the club's bridge credits statement with the ABF.	11
Access	Manage who gets administration access to these areas.	12
Settings	Manage the club's basic details and assorted member, financial and session settings.	13

(*) Note that there are separate more detailed user guides available for the following areas:

- Members & Contacts (In three parts)
- Sessions
- Calendar (Tournament Organiser Guide – in two parts)

The rest of this document describes the different menu items, how to access them, and how to use the components in them.

1.2. What is set up?

All clubs have been set up in My ABF. Clubs who have not nominated anyone to be their initial administrator have been set up with a dummy "ABF" user as administrator (and as secretary) to ensure no-one can access their administration menu until they are ready to become active.

Initially all clubs will be set up with the basic access control option (see section 12 below for more details). It is then up to the club to determine if they wish to move to the advanced access option which allows them to refine access rights in specific areas and determine who has permission to change those access rights. Details are in section 12 below.

1.3. How does a club gain initial access to use the admin area?

Any club wishing to use any of the club admin functions will need to:

- Nominate who their initial administrator should be (usually the club secretary but can be anyone they choose). Contact My ABF Support or Julian Foster (julian.foster@abf.com.au) who can provide access to that administrator. An introductory guide is also provided.
- Gain familiarity with the admin menu
- Use the Access area (see section 12 below) to determine who should have access to the various areas
- Consider customising their Public Information page

1.4. What do clubs need to do to use specific areas?

Clubs that wish to send emails to their members through My ABF will need to do the following:

- Create their membership types
- Import their members and update the list to be current
- Manage email addresses for their "unregistered users" (i.e. members who are not registered in My ABF)
- Set up at least one template for their outgoing email(s)
- Optionally set up tags to be able to identify sub-groups of their members

Clubs that wish to run an event will need to do the following:

- Establish who should have access to the Congress area
- Review the Tournament Organiser guidance material available (Checklist, Guide, Videos, etc)
- Set up the underlying "Series"
- Create the event
- Complete the set up wizard to generate the event webpage

Clubs that wish to use the functionality to accept payment for club sessions through bridge credits will need to do the following:

- Create their membership types
- Create their payment types
- Create any extra types of income they want to track (coffee, book sales, etc)
- Create their session types and assign $ rates to them
- Import their members and maintain the list to be current

Clubs that wish to fully manage their membership will need to do the following:

- Review their club's membership year end
- Create their membership types
- Turn on Full member management
- Import their members and associated data for those members
- Review the period(s) created and, if necessary, issue bulk renewals to assorted member types.

1.5. Where can clubs get more information?

See the Clubs page of the My ABF Resources webpage: https://www.abf.com.au/member-services/my-abf-resources/clubs/

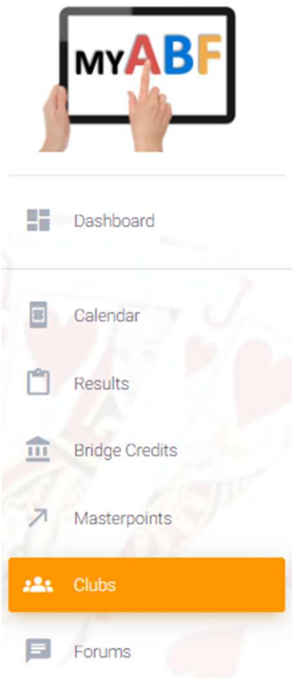
There is also extensive guidance material for running Congresses on the Tournament Organisers page: https://www.abf.com.au/member-services/my-abf-resources/tournament-organisers/

2. Accessing club administration features

There are assorted ways to access the new features.

2.1. Via the Clubs main menu item

Every user will now see a Clubs listing on their main menu:



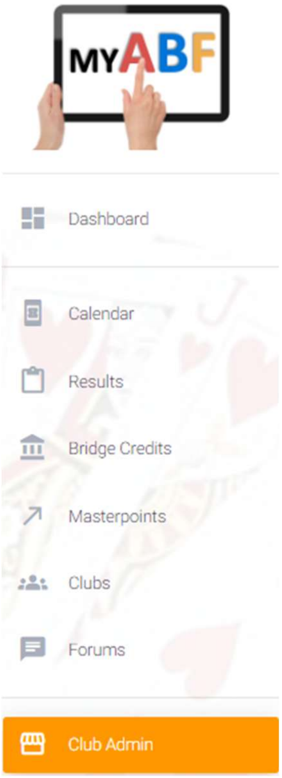
This page lists all the clubs set up in My ABF (it will ultimately replicate the listing of clubs currently available in the Masterpoint Centre).

It also shows the clubs that the user has administration access to – with a link to open the Club admin menu in the latter case.

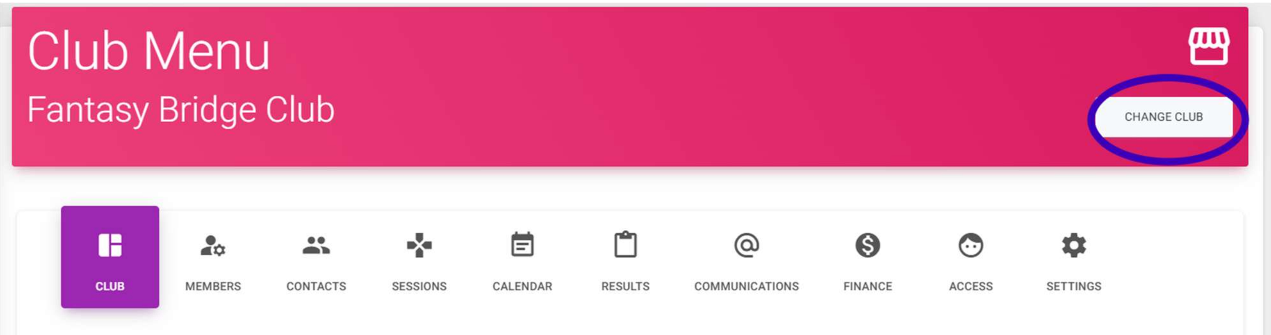
This page will be revised as all club membership information is transferred to My ABF.

2.2. Via the Club Admin Menu item (much easier)

Where you have some admin rights for a club, you will also see a Club Admin main menu item:



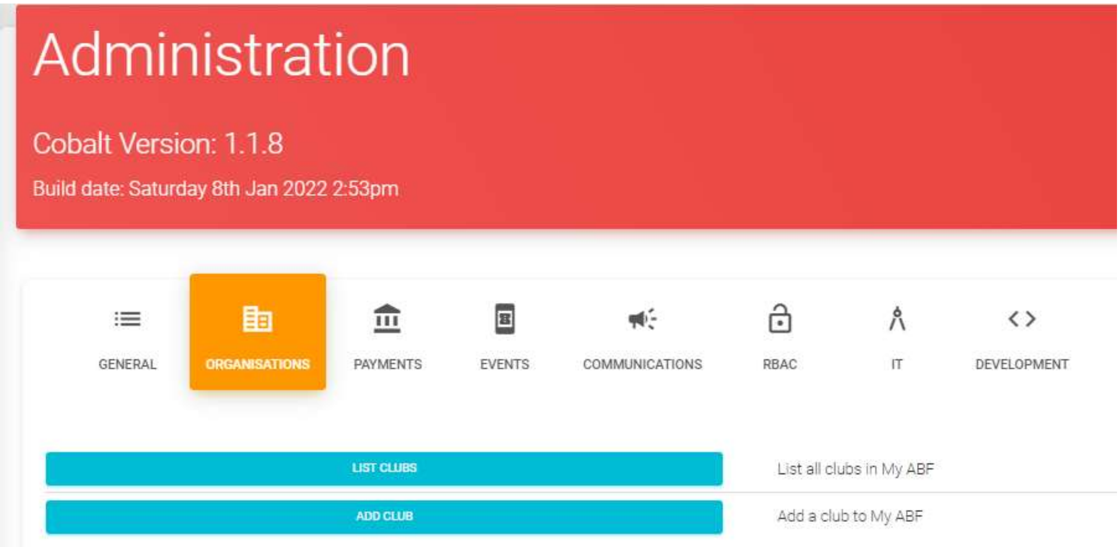
This will directly open the Club menu:



If you are an administrator with access to multiple clubs you will be able to toggle between them using the Change Club button at the right of the screen (the system will remember this selection so when you re-open this screen it will return you to the last club you were in). Always be careful to check what club you are in (the club name is prominently displayed across the top of the menu at all times).

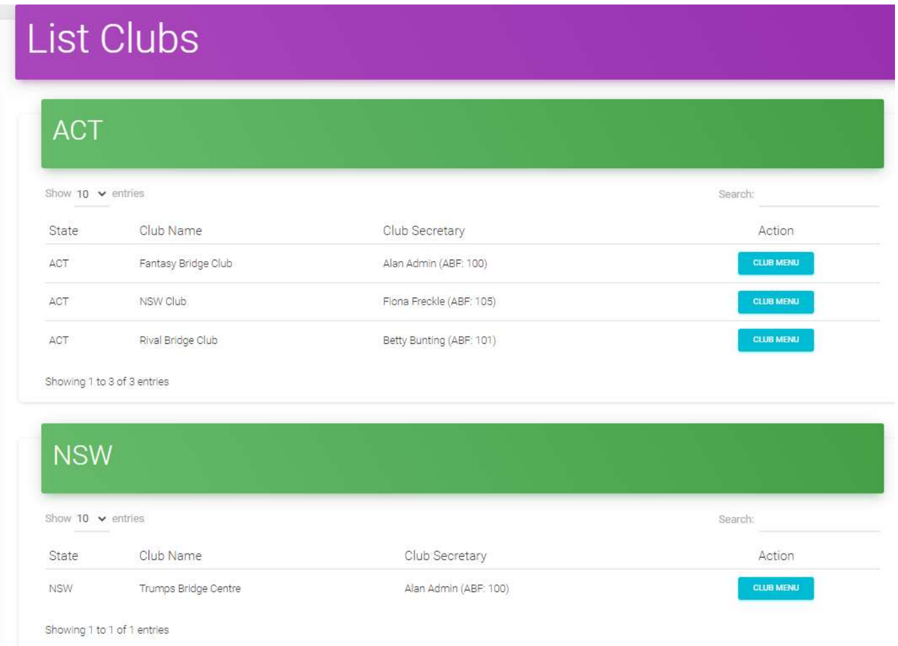
2.3. Via the main Admin menu

Users with higher level access (e.g. State or ABF level; or those with some level of IT system access) will also be able to see an overall Admin menu. They can also access clubs through that menu by selecting Organisations:



Everyone with access to this menu will be able to see the List Clubs button. You will only see the Add Club button if you have specific administration rights allowing you to create clubs.

After clicking List Clubs you will see a list of all the clubs by State that have been set up and, for those you have admin access to, you will see a Club Menu button:

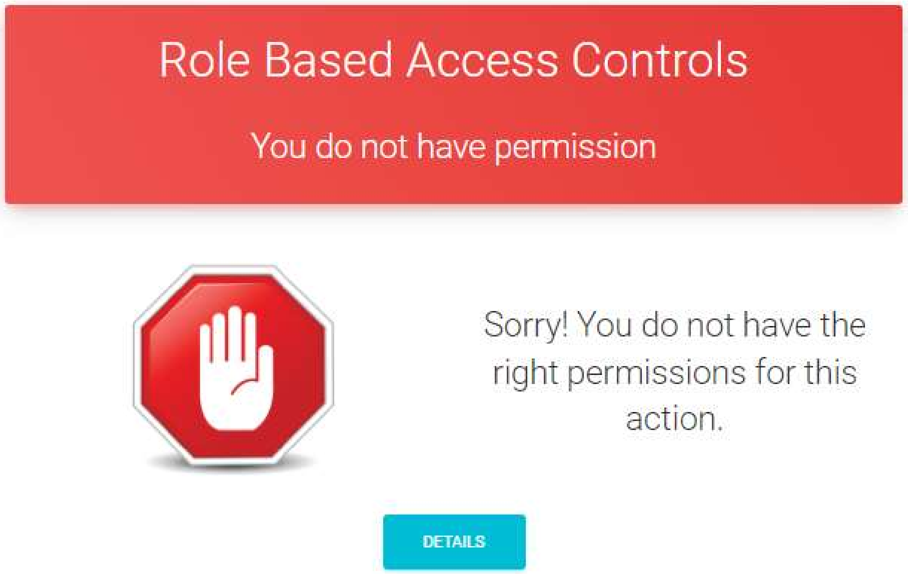


Clicking on the Club Menu button will open that club's admin menu.

3. Limitations on access rights

Not every user will be able to see or access all the areas in the Club Admin menu. Which parts you see will depend on the access rights you have (these are described in section 0 below).

Some parts are hidden unless the user has access, some parts remain visible but use is blocked unless a user has access. A screen like the following will appear if a user attempts to access an area they don't have the right permissions to use:

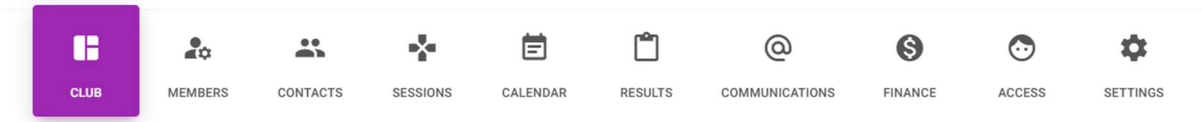


Clicking on Details will provide further explanation of why they cannot access the area and who to contact if they wish to have access added.

MAJOR SECTIONS OF THE CLUB ADMIN MENU

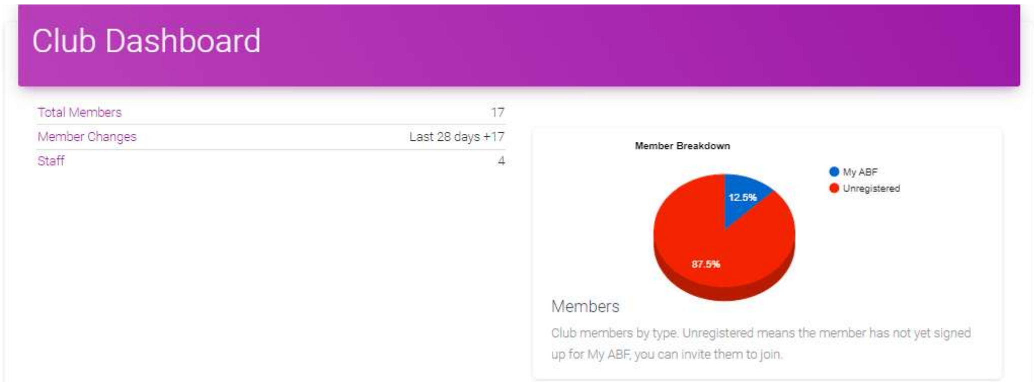
The contents and functionality of each section is described below.

4. Club

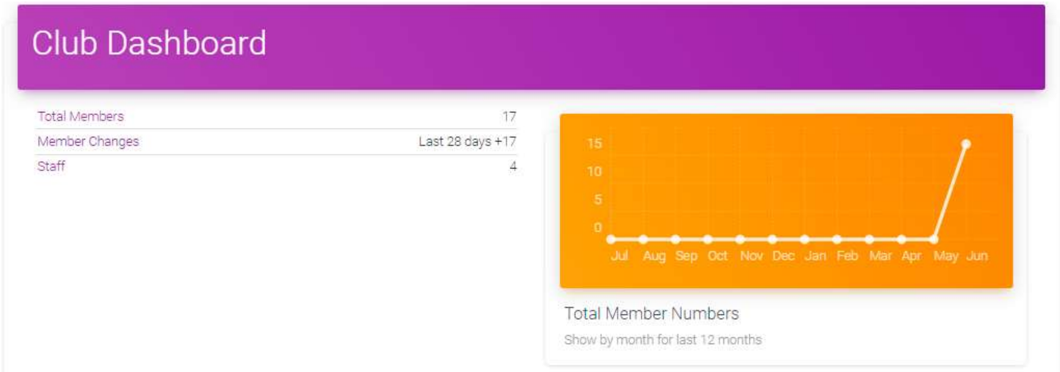


This is a top-level dashboard for your club. This will probably evolve over time but at this stage it just shows total members, changes in the last month and how many staff (administrators) the club has. If you click on each of these you will see different graphics on the right.

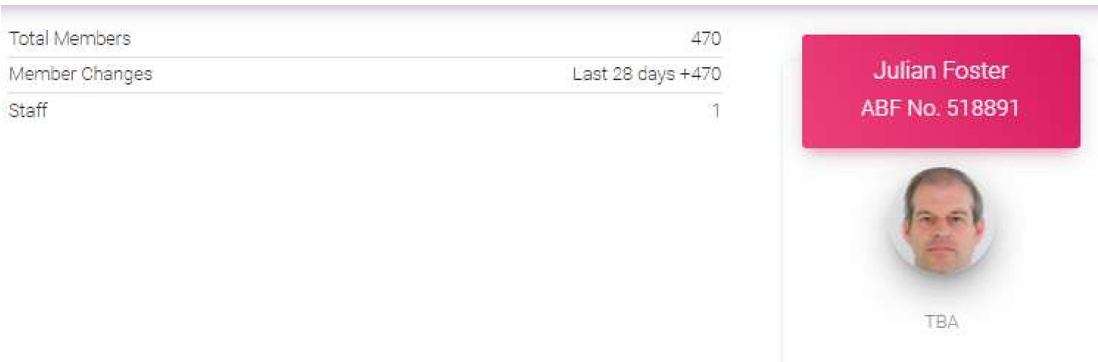
<u>Total members</u> (the default view) shows a pie chart with the breakdown of members between those registered for My ABF and those not:



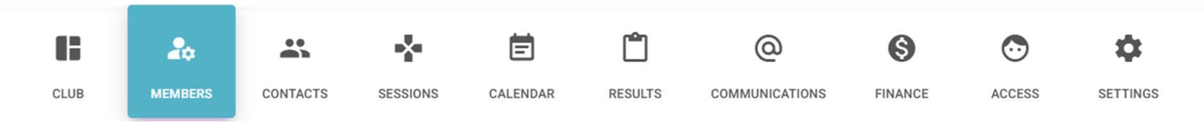
<u>Member changes</u> has a graph showing the movement in the club's membership numbers:



<u>Staff</u> shows the My ABF users who have administration roles for the club:



5. Members (Separate user guide available)



This area gives you the ability to view and import/edit the list of members for your club.

5.1. Introduction – and purpose of the functionality

The purpose of doing this is to track your club's members. There are several reasons why you would want to do this:

- If you want to fully manage your membership through My ABF (i.e. track when they are paid up to, issue renewals, etc). See 5.2 below.
- If you are going to use the Communications section (see 10 below) to send emails to members or groups of members.
- If you are going to use the Sessions section (see 0 below) to allow players to pay for your club sessions with bridge credits (members and non-members usually pay a different rate).
- If you are going to use the Calendar section (see 8 below) to run a Congress which is limited to members or to charge different entry fees for members and non-members (covered in separate Tournament Organiser Guides).

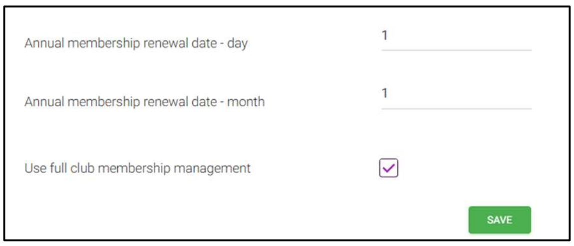
5.2. Modes of member management

My ABF offers two modes of member management:

- **Simple** – here you can maintain a list of members and record assorted data fields for those members. You can also manually record the periods to which their memberships apply.

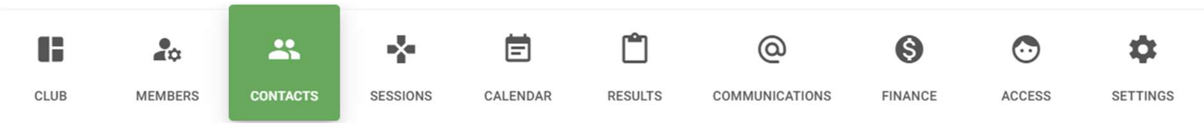
- **Full** – here you can do the same as Simple mode but also:
    - Issue membership renewals (individually or in bulk)
    - Email members to chase unpaid renewals
    - Allow players to pay their membership fees with bridge credits (with a facility to collect them automatically on a set date unless the player opts out)
    - Have the system automatically update the membership status based on their existing membership period(s) and whether or not they have paid.

It is expected in future that Simple mode will incorporate the function currently still within the ABF masterpoint centre – i.e. maintaining home club members. All clubs will therefore have that enabled. Clubs who wish to use My ABF more extensively to manage all aspects of their memberships should select Full mode. The mode is selected under Settings – General:



A separate User Guide is available that covers how to upload and maintain Members in My ABF.

6. Contacts (within separate Membership user guide)



Contacts are new to release 6.0 in My ABF. They allow a club to maintain an additional list of people who are not members of the club – but for whom the club may wish to be able to send email communications to. The two obvious groups are:

- Regular visitors to a club
- Recent beginner lesson attendees

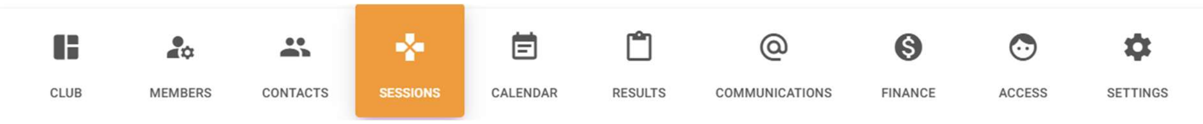
Unlike Members, Contacts are not required to have an ABF number – they can just be a name and email address (often the case for beginners). It is possible to later convert a Contact to a Member (but at that point they do need to have a valid ABF number).

When someone is removed as a Member from a club they initially become a Contact (so the previous member history is not lost and can be recalled if they subsequently rejoin).

The Communications functionality (see section 10 below) can be used to select Contacts or tagged subgroups of Contacts to be able to send emails to them in the same way emails can be sent to Members or event entrants.

See the separate Membership User Guide for details of uploading and maintaining Contacts.

7. Sessions (separate user guide available)



This is where directors or club administrators can start club sessions, import player names from the scoring software (or directly via csv), perform a financial reconciliation for the session and initiate bridge credits charges for that session to players My ABF accounts (where they have opted for that payment method).

It can dramatically reduce the amount of cash (or individual EFTPOS receipts, vouchers, tokens, etc) a club needs to handle which makes the session reconciliation a lot easier.

It is also very convenient for players who can just have their sessions charged to their bridge credits account (which they can top up manually or have it done automatically). They can turn up and play and no longer have to remember to bring vouchers or cash, etc.

To be able to use this area a club needs to set up assorted things first:

- Create their membership types
- Create their payment types
- Create any miscellaneous categories of income they want to track
- Create their session types and assign $ rates to them
- Import their members and maintain the list to be current

The information set up with these steps is what enables the system to calculate table fees for the players in the session (i.e. identify if they are members, visitors or those in a special category where different fees apply). All amounts are manually adjustable by the director or club administration.

See separate Club Sessions user guide for the details of how to use this area.

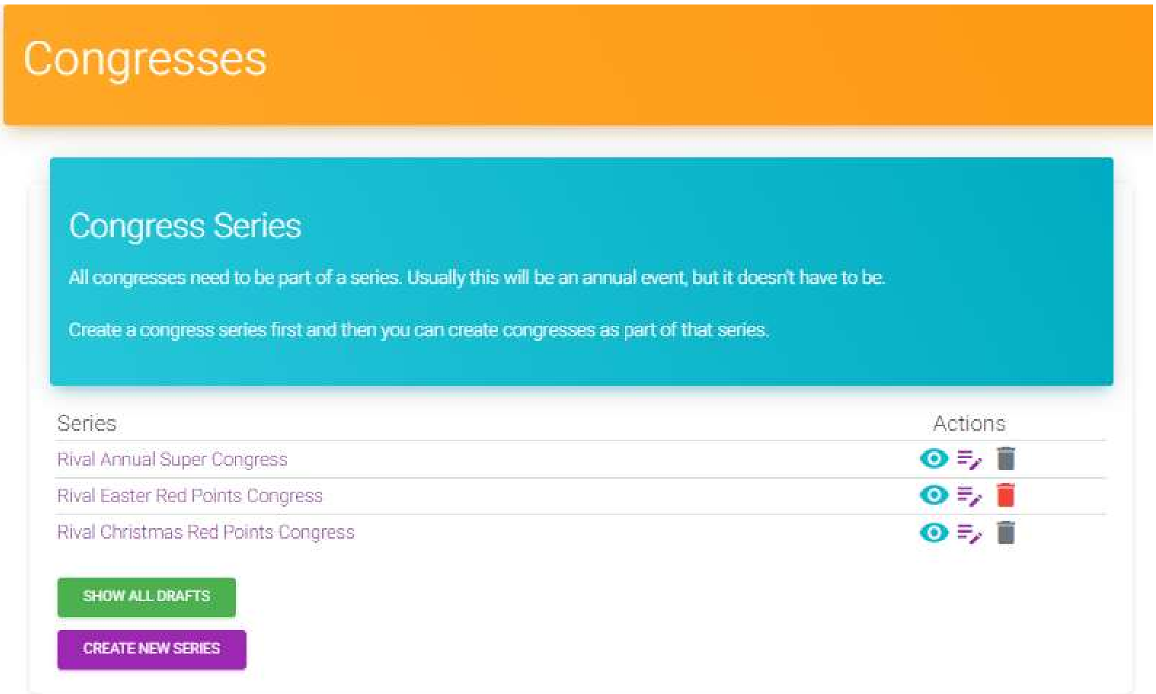
8. Calendar (separate Tournament Organiser Guides available)

Each calendar listing "belongs" to a bridge organisation. This is where an Organisation can manage the ones it has and create new ones. Note that calendar listings are referred to as "Congresses" here but this term also encompasses other functions you might wish to list – club events, workshops, lessons, etc. Basically anything where you want players to enter (and potentially pay) in advance.

There is a separate Tournament Organiser guide available for this area. It is in two parts:

Part One – Creating a calendar event
Part Two – Managing a calendar event

8.1. Understanding Congress "Series"



Every Congress must be part of a "Series". This allows several congresses to be associated together – usually each annual running of the same event (although it can be any frequency you want).

Although Series have a name, this is just a system placeholder and is visible only to Administration staff. Each individual congress within that series can be named whatever you want (but of course a lot of the time they will just take the same name as the underlying series).

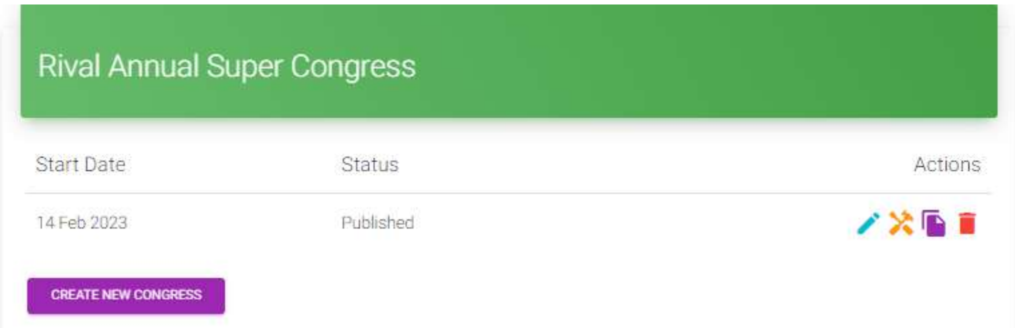
Anyone with Congress administration rights for the organisation (covered in the Access section) can set up a Congress within an existing series. This page is where those series themselves can be set up and managed. Up to now, it has only been possible to set up a new series by requesting it from Julian Foster.

It is STRONGLY RECOMMENDED that each separate major event you run is set up as a different series. While it's possible to just "copy" an existing congress and use it as a template for a new one all within the same series this could create confusion in the future if you want to report on previous editions of the same event. Keeping them as separate series is a lot cleaner.

Within this area you can view the series, rename the series and delete the series (but only if there are no active congresses within it).

8.2. View the series

After creating a new series, you can view the series and add/manage congresses within it:



This list shows both Draft and Published congresses.

8.3. Create a brand new congress / Roll forward a previous one

"Create New Congress" button starts a brand new blank congress within the series which is typically only what you'd do in the first year of a Congress.

More commonly you want to roll forward last year's to re-use most of the webpage information.

Once a congress already exists, it can be managed from here. The icons shown are:

	EDIT	Edit the congress (same as the Edit button on the Congress listing)
	MANAGE	Manage the congress (same as the Manage button on the Congress listing)
	COPY	Copy the congress (usually to roll it over to the following year's running of the event).
	DELETE	Delete the congress (but this is only possible if there are no entries and no events in it. So, in practice, it's only empty shells of congresses that can be immediately deleted).

If you have an existing congress and you want to set it up for the new year use the COPY function to foll forward last year's. It's like a Save As function. **<u>NEVER DIRECTLY EDIT AN OLD CONGRESS TO TURN IT INTO A NEW ONE!</u>** That will leave all last year's entries in it – and to players it will look like they have entered with the new dates!

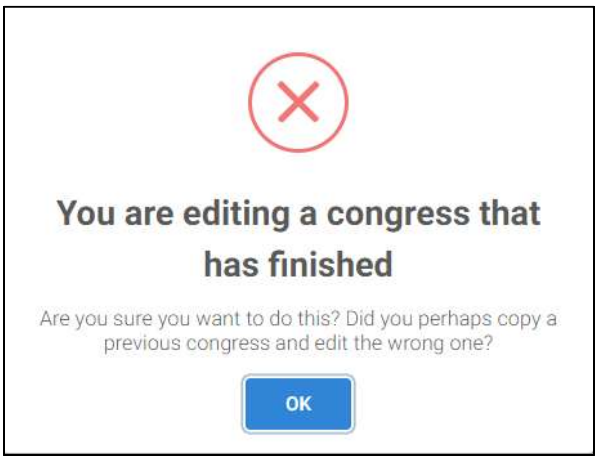
After rolling a congress forward the Start Date is incremented by a year (you may of course need to edit this slightly) and the status of the new congress is set to Draft:

Having rolled forward, to work in the new congress, click the Edit icon against the new Draft to continue to update it for the new year. When ready, the new congress can be published.

After it's published you can still come back here but it's a lot easier to use the Edit and Manage buttons that administrators can see in the header of the Congress page.

8.4. Editing a congress

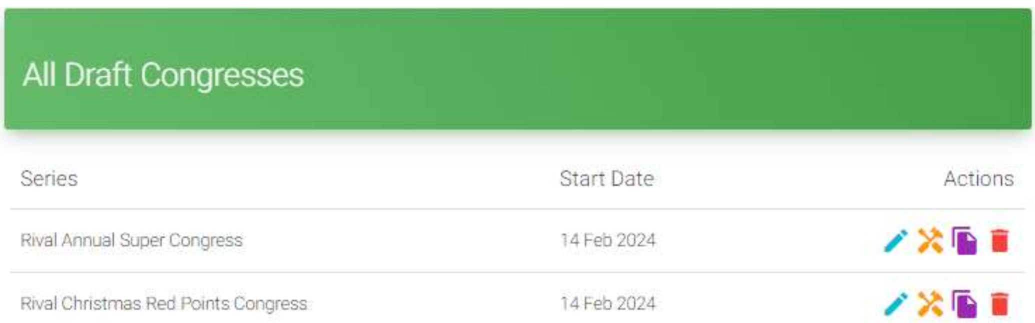
If you attempt to edit a congress that has already finished you will be presented with a warning message on screen since, whilst not impossible, this is unlikely to be a valid action:



8.5. Viewing all drafts

If your organisation has multiple series and several draft congresses amongst them, it is possible to list all drafts using the "Show All Drafts" button.

This will show all congresses with a Draft status, the series they are part of, and the start date. You can then access the Edit, Manage, Copy and Delete functions as normal.



9. Results

This section is where clubs can upload results. This in turn will allow players to view their results within My ABF.

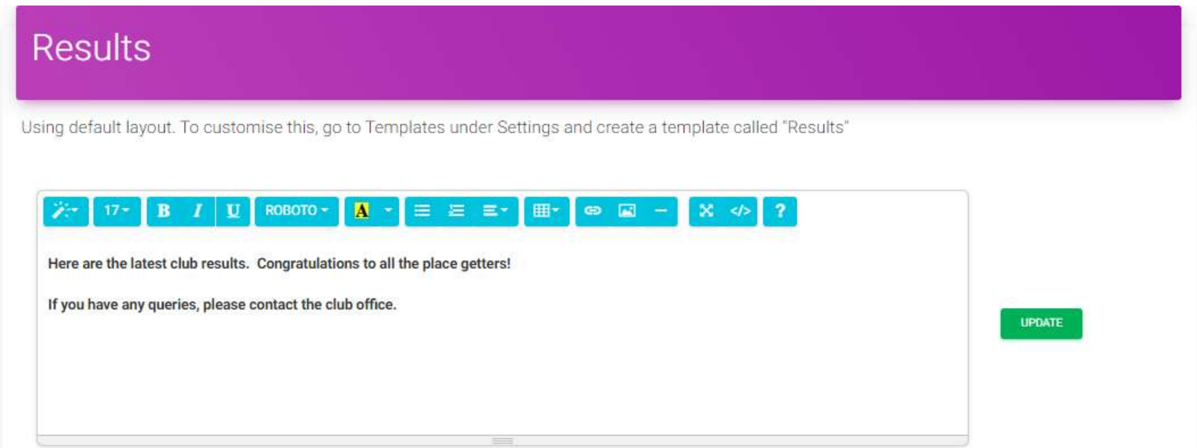
At this stage it covers club sessions (scored by matchpoints, cross imps or butler imps). It will later be extended to display other tournament event formats (swiss pairs, teams, etc). The process involves importing a results file (an xml file in a special format called USEBIO) from a scoring program and then publishing it.

My ABF generates an email to be sent to players when the results are published (players can opt out of this email if they wish – see 9.6 below).

It is possible, however, for the club to disable the sending of results emails altogether (for example you might already be emailing players with results via Pianola so you may not want them to get two emails even though you do want them to be able to see their results in their My ABF dashboards). Results emails can be disabled through the Settings area – see 13.4.5 below.

9.1. Club - Email template for sending results to players

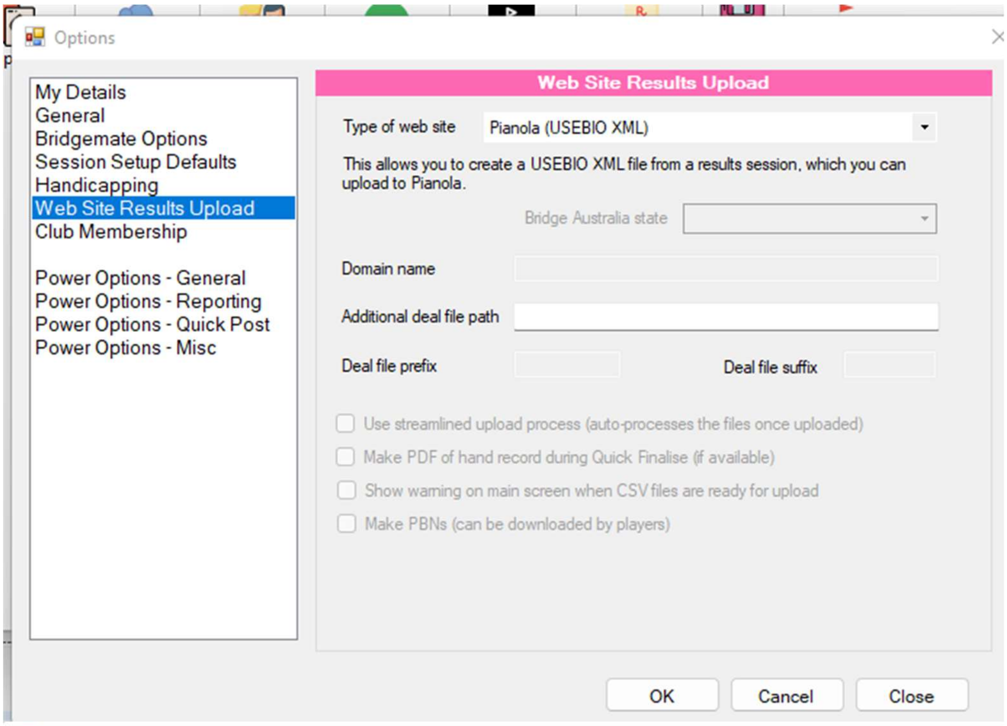
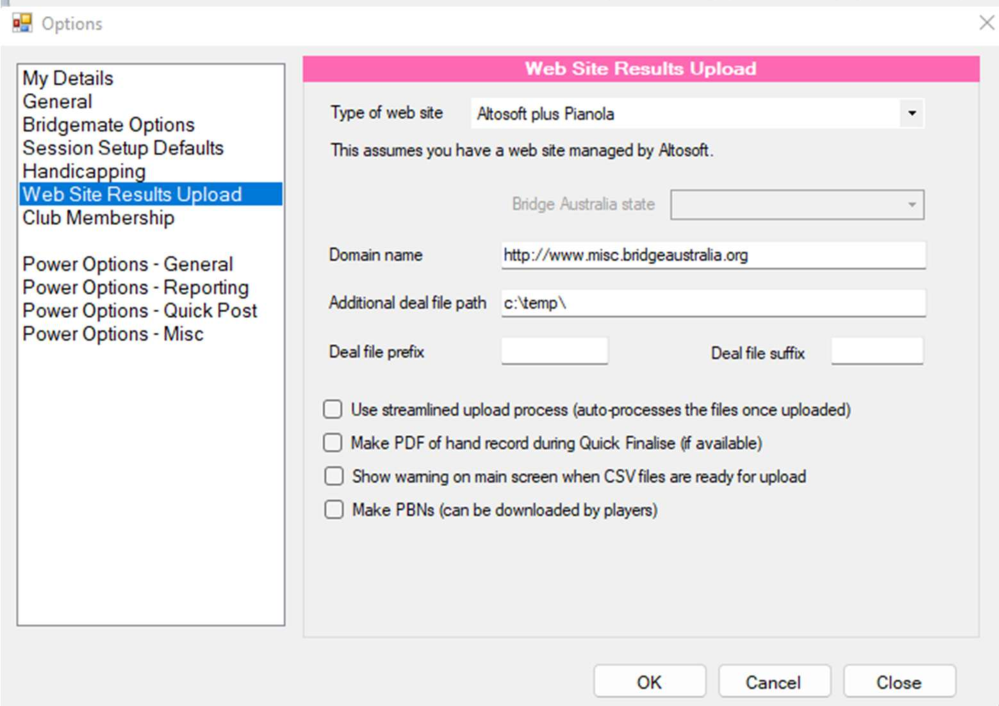
The first part of the screen allows you to create an email that will be sent to players. Format your message and click Update to save it. You can also create a specific template for results to customise the way the email is presented – see section 13.4.2 below for more information about templates.



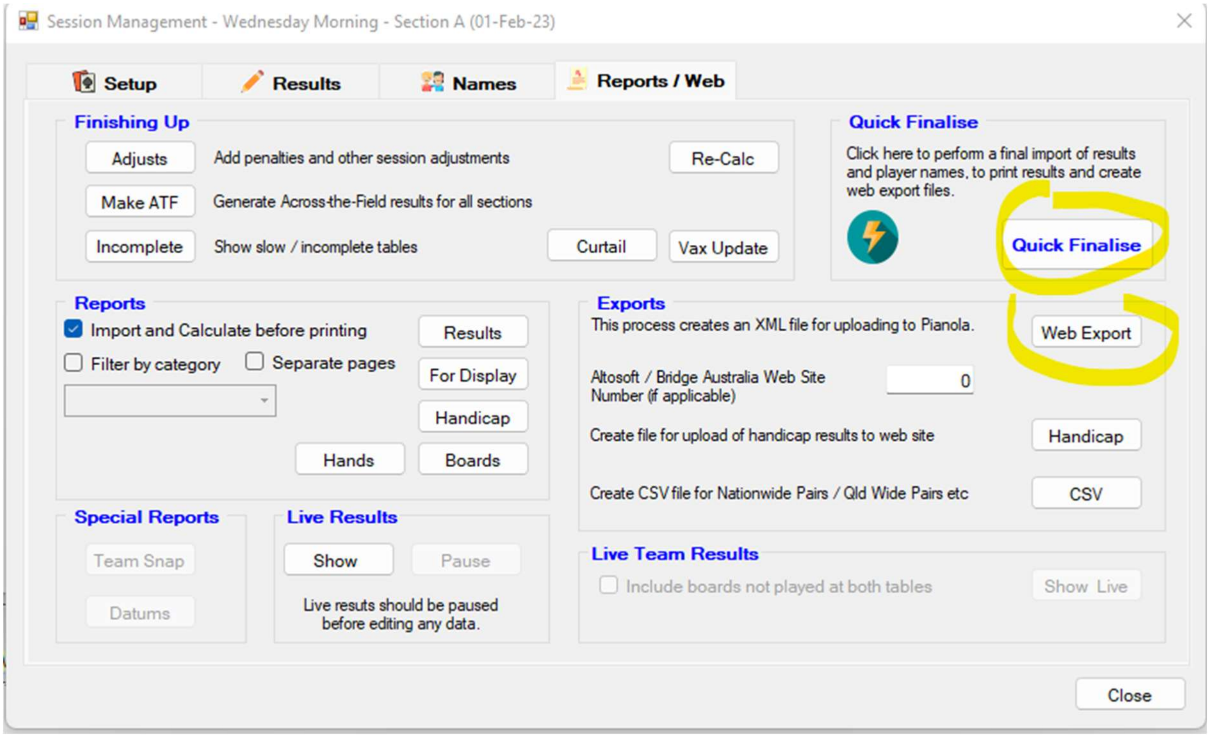
9.2. Club - Obtain results file from Compscore or other scoring program

If you are using Compscore these are the instructions for obtaining the results file. If you are using other scoring programs, you may also be able to obtain a similar file but may need to enquire of the provider exactly how to do that.

Within Compscore go to: Setup | Options | Website Options , choose either "Pianola", or "Altosoft plus Pianola" if also exporting to a Compscore web site.

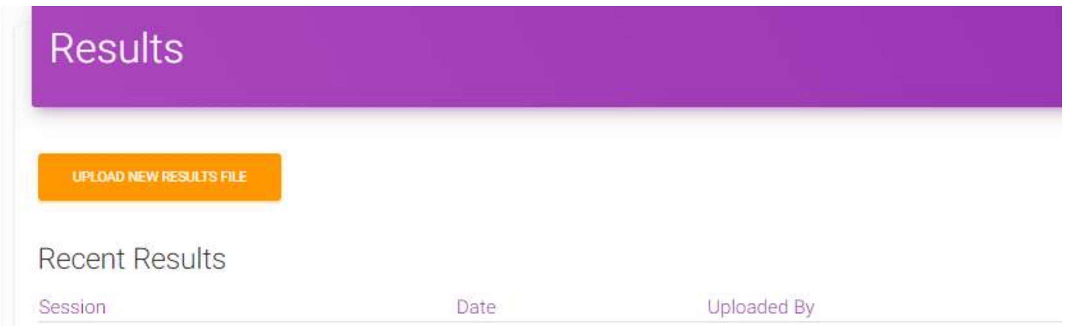

Options
My Details
General
Bridgemate Options
Session Setup Defaults
Handicapping
Web Site Results Upload
Club Membership
Power Options - General
Power Options - Reporting
Power Options - Quick Post
Power Options - Misc
Web Site Results Upload
Type of web site
Pianola (USEBIO XML)
This allows you to create a USEBIO XML file from a results session, which you can upload to Pianola.
Bridge Australia state
Domain name
Additional deal file path
Deal file prefix
Deal file suffix
Use streamlined upload process (auto-processes the files once uploaded)
Make PDF of hand record during Quick Finalise (if available)
Show warning on main screen when CSV files are ready for upload
Make PBNs (can be downloaded by players)
OK
Cancel
Close

Options
My Details
General
Bridgemate Options
Session Setup Defaults
Handicapping
Web Site Results Upload
Club Membership
Power Options - General
Power Options - Reporting
Power Options - Quick Post
Power Options - Misc
Web Site Results Upload
Type of web site
Altosoft plus Pianola
This assumes you have a web site managed by Altosoft.
Bridge Australia state
Domain name
http://www.misc.bridgeaustralia.org
Additional deal file path
c:\temp\
Deal file prefix
Deal file suffix
Use streamlined upload process (auto-processes the files once uploaded)
Make PDF of hand record during Quick Finalise (if available)
Show warning on main screen when CSV files are ready for upload
Make PBNs (can be downloaded by players)
OK
Cancel
Close

When you have completed the session and are ready to export results go to Reports / Web and click either Web Export or Quick Finalise to create the export files (XML files are stored in C:\Compscore3\Web\XML Files).



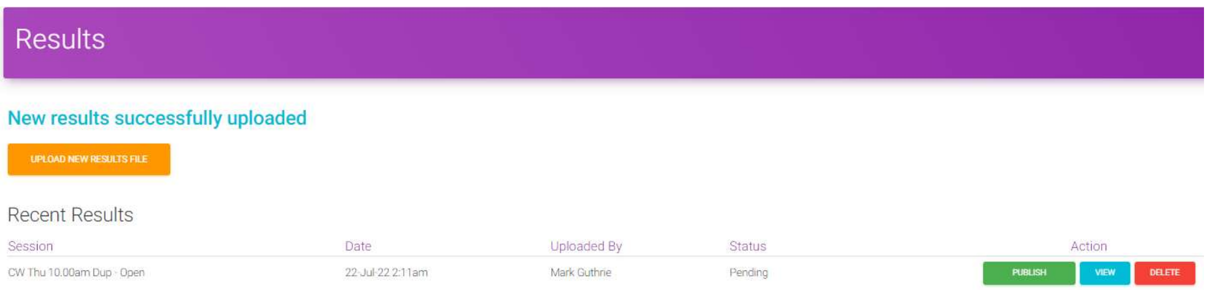
9.3. Club - Upload results file into My ABF & publish

To upload results click Upload New Results File:



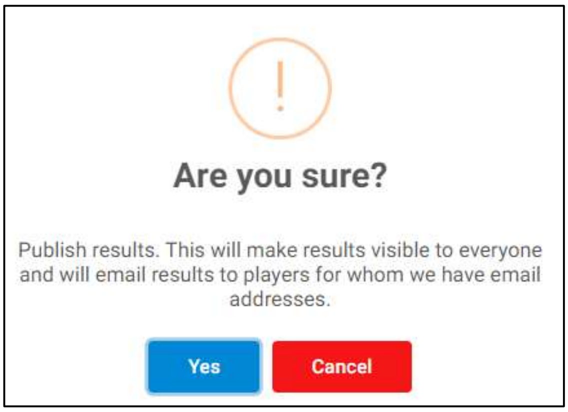
Browse for the results file (the xml file in USEBIO format – as exported from the scoring program).

After upload you will see the file in a draft mode:



You can view the results yourself using the View button.   But they will not yet be visible to players.

To make them available, click Publish. You will see a confirmation message:

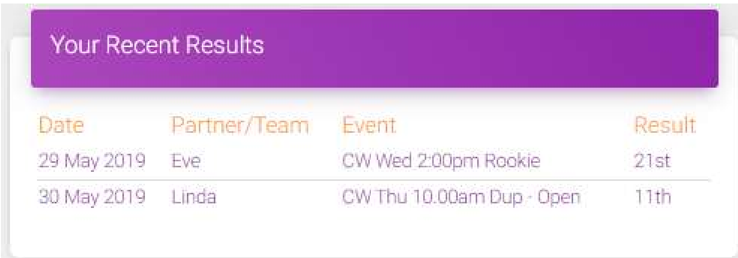


Click Yes to make the results public and email players who have nominated to receive such emails.

9.4. Player – Where to find results

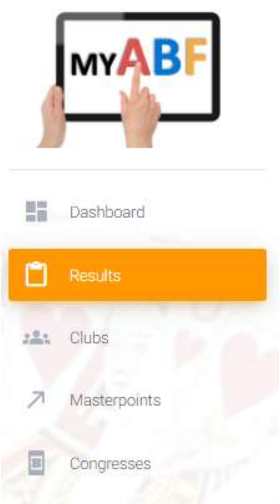
My ABF users within the file who are logged in will now be able to see personalised results. There are two places they can find them.

9.4.1. On their dashboard:



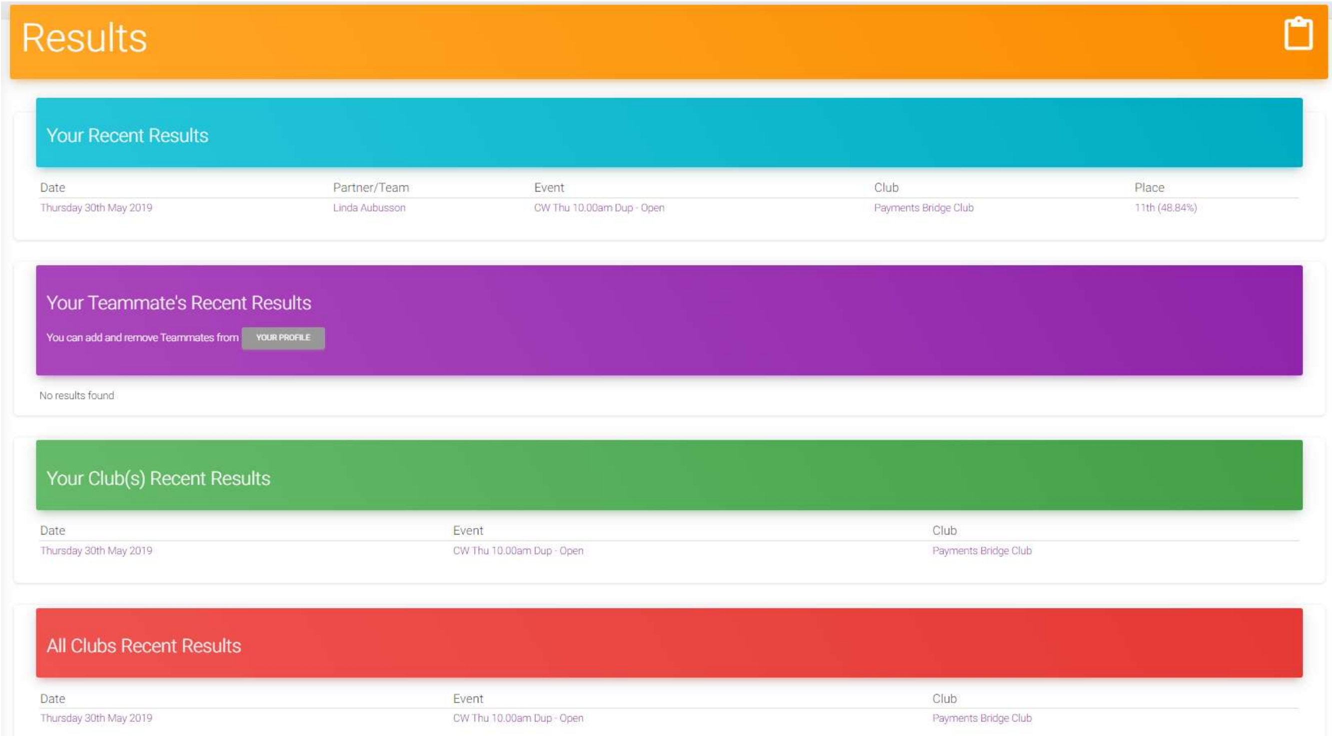
This lists their most recent results. Clicking on a row directly opens that session's results – see details at 9.5 below.

9.4.2. Via their results page in the main menu



That opens a page which includes:

- their recent results (the ones also on their dashboard)
- their team-mates' recent results (if they have defined any teammates in their profile page)
- results from their club(s) (i.e. including sessions they may not have played in themselves)
- all results uploaded by all clubs in My ABF



Clicking on a row directly opens that session's results – see details at 9.5 below.

9.5. Player – Results content

Session results will open with a ranking list. If the user played in the session their own result is highlighted:

CW Thu 10.00am Dup - Open

Rival Bridge Club

30/05/2019

Directed by Angie

North-South

Place	Players	Score	Green Masterpoints
1	Berri Folkard & Helen Lowry	58.10%	0.51
2	Sally Zylberberg & Lee Santow	56.37%	0.36
3	Yogi Yoga & Zara Zed	56.02%	0.26
4	Graham Mcmahon & Peter Jonker	55.32%	0.17
5	Sally Simon & Di Moritz	54.63%	0.13
6	Jake Lin & Kevin Wu	54.40%	0.10
6	Fran Campbell & Joyce Edwards	54.40%	0.10
8	Monika Nilsson & Margie Hullah	52.78%	0.07
9	Mary Atkinson & Janis Grauds	52.55%	
10	Sandy Kaplan & Jenny Narunsky	48.96%	
11	Lucy Likeable & Linda Aubusson	48.84%	
12	Dianne Simpson & Patricia Sweeney	48.61%	
13	Roslyn Hunyor & Trish Harrison	45.83%	
14	Henny Theeboom & Alice Sternhell	42.71%	
15	Richard Kuipers & Peter Koorey	40.86%	
16	Shirley Gill & Joan Castle	40.39%	
17	William & Jill Eyre	39.24%	

It is then possible to click through to personal score sheets, individual boards, etc in the usual fashion.

Julian Foster & Linda Aubusson

Pair 4NS (11th with 48.84%)

Board	Opponent	Contract	Declarer	Lead	Tricks	Score	Percentage	
1	Gwen Cordingley & Jill Harrison	3♥	N	5♦	7	-100	53%	=
2	Gwen Cordingley & Jill Harrison	4♠	N	3♣	11	650	66%	
3	Gwen Cordingley & Jill Harrison	1NT	N	8♦	8	120	100%	
4	Narelle Clark & Jann Cathels	4♠	E	8♣	11	-650	44%	=
5	Narelle Clark & Jann Cathels	2♠	E	A♥	7	50	13%	
6	Narelle Clark & Jann Cathels	2♥	W	2♦	10	-170	16%	
7	Beverley Callaway & Yolande Schneider	4♥	N	2♣	10	620	63%	
8	Beverley Callaway & Yolande Schneider	5♥	W	K♦	11	-450	28%	

Traveller for Board 1

NEXT

Jump to BOARD 1

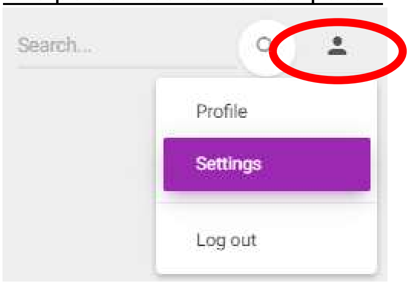
North-South	East-West	Contract	Declarer	Lead	Tricks	Score	NS MPs	Percentage	
Mary Atkinson & Janis Grauds	Gordon Rudd & Anne-Marie Hazell	3♦	W	Q♠	6	150	32.0	100%	
Par Contract: 2C by NS or 1N by S for 90									
Henny Theeboom & Alice Sternhell	Beverley Callaway & Yolande Schneider	3♥	N	A♦	8	-50	28.0	88%	
Berri Folkard & Helen Lowry	Rosalind Hayden & Vivienne Kissane	3♥	N	7♦	8	-50	28.0	88%	
Fran Campbell & Joyce Edwards	Narelle Clark & Jann Cathels	3♥	N	8♦	8	-50	28.0	88%	
Shirley Gill & Joan Castle	Roger Watts & Pam Brophy	3♠	S	A♦	7	-100	17.0	53%	=
Julian Foster & Linda Aubusson	Gwen Cordingley & Jill Harrison	3♥	N	5♦	7	-100	17.0	53%	=
Richard Kuipers & Peter Koorey	Arthur Bragg & Allan Pike	3NT	S	A♦	7	-100	17.0	53%	=
John Mottram & Lorraine Schaap	Alicia Mercer & Margarita Beker	3♥	N	8♣	7	-100	17.0	53%	=

9.6. Player - Control of results email notifications

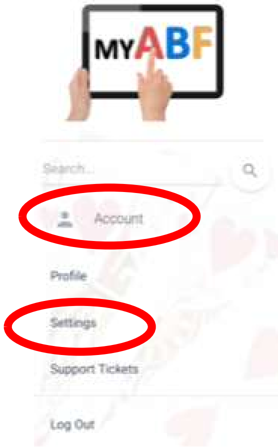
Note that results emails are not related to your club members. They are simply sent to anyone playing in the session for which My ABF has an email address.

Players can, however, opt in or out of receiving results emails. They do this on their Settings page which is opened via:

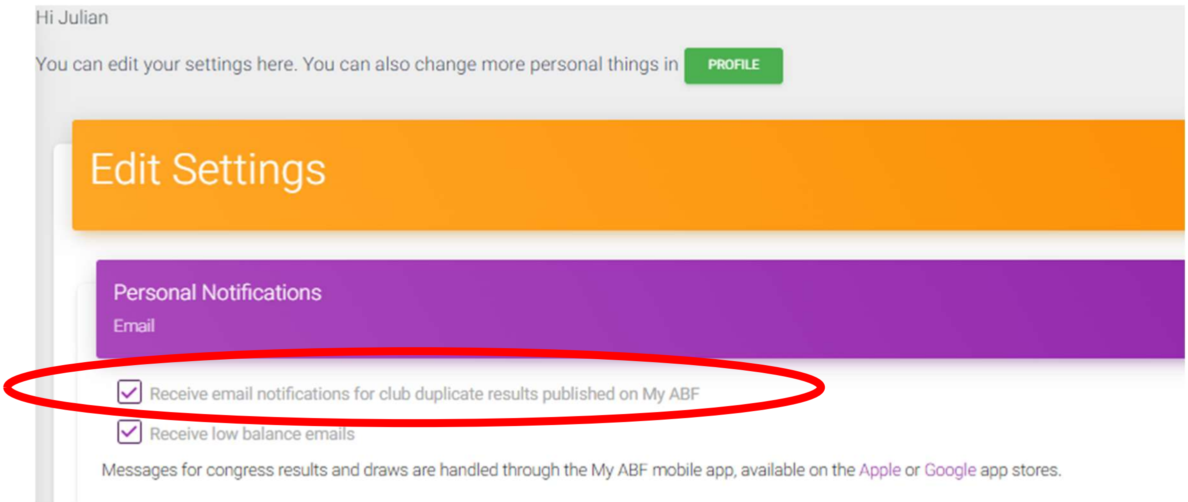
The person icon on a computer:



The Account menu on a tablet/phone:

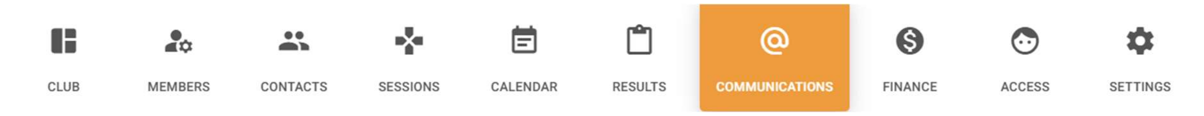


Under Personal Notifications there is a box which players can untick if they do not wish to receive results emails from My ABF.



Unregistered My ABF users do not have this page but they have an ability to unsubscribe from all My ABF emails via the link at the bottom.

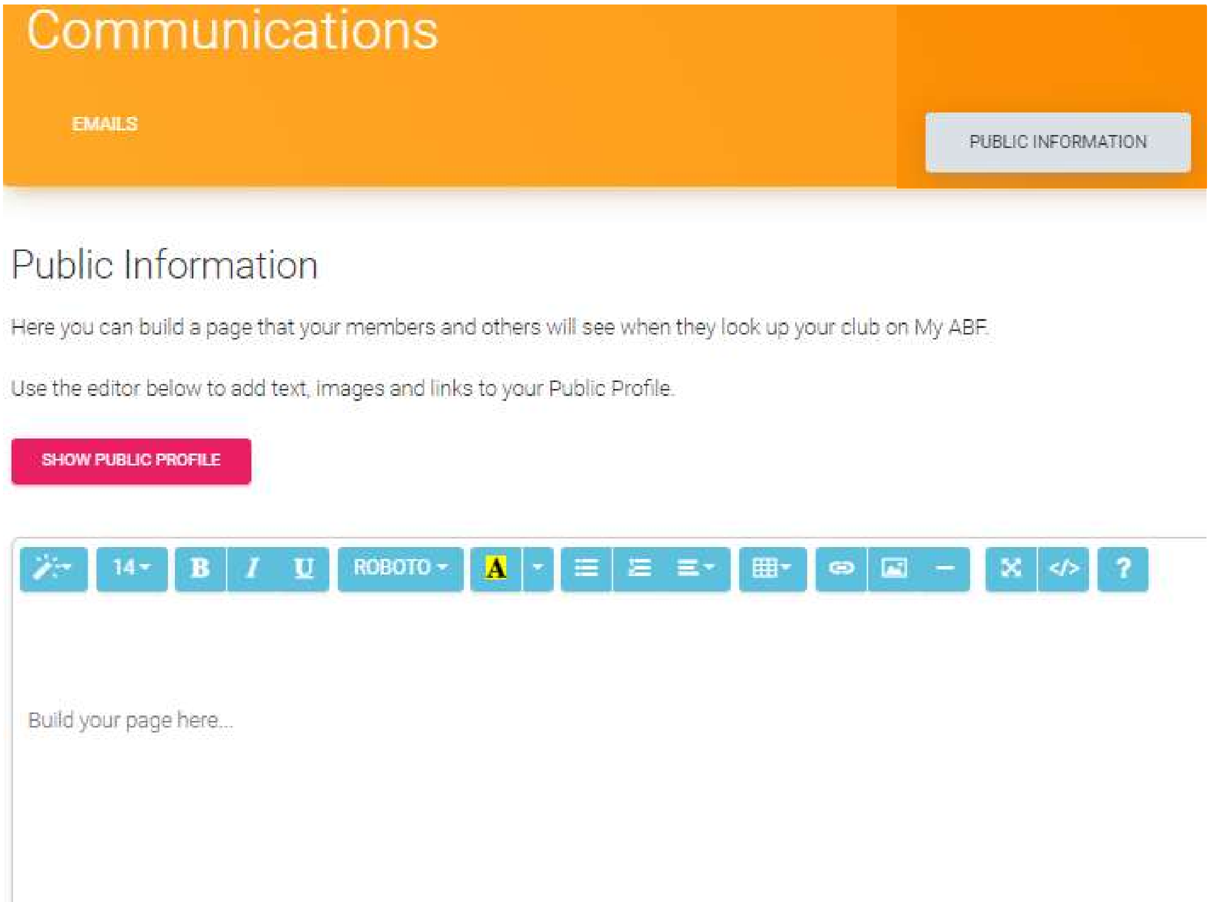
10. Communications



This section primarily covers how clubs can communicate with entrants to their tournaments or their members and contacts by sending emails. There is also, however, the facility to create a profile page for the club.

10.1. Public information

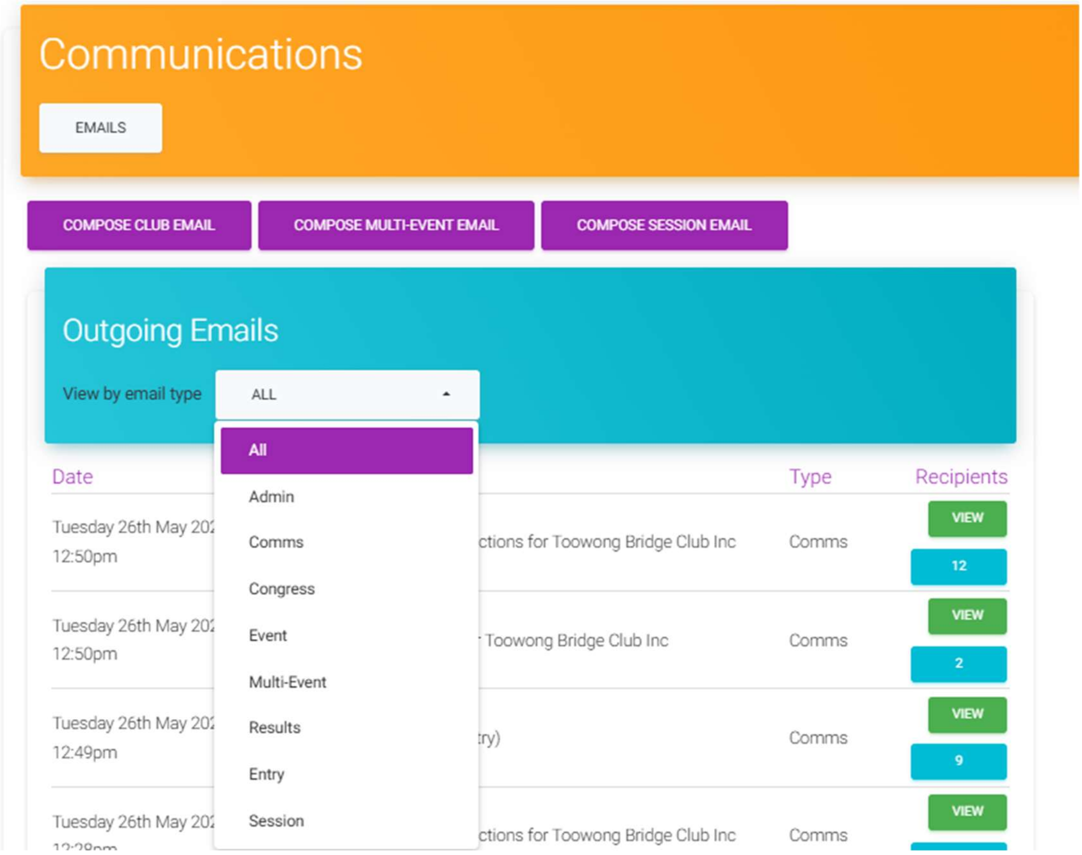
It is possible to create a simple profile page with information about the club. This will operate in a similar way to the Congress webpage builder. At this stage these pages will only be accessible when the club name appears in a search or in a member's profile. They will not be used for anything else but in future they may become the basis for a club to have a more complete webpage within My ABF.



10.2. Emails – Introduction

Clubs can use My ABF to send various types of emails – most can be initiated from the Communications screen (some can also be initiated from elsewhere).

Here is a sample of the Email Communications screen:



From here it is possible to:

- Compose a club email - i.e. send an email to members, contacts or tagged subgroups of them.
- Compose a multi-event email - i.e. select assorted events or congresses to email that entrant list.
- Compose a session email – i.e. select one or more sessions and email everyone who played in those sessions.
- View details for outgoing emails of various types.

10.3. Email types

Outgoing emails from clubs have been classified into three types, two of which have sub-types. The following table describes these:

Type	Sub-type	Description / Examples
Club emails	Admin	Financial – e.g. club paying or charging a member.
	Comms	General club email sent to members, contacts or a tagged sub-group of them. Welcome email sent to new members.
	Results	Results email sent to players in a session where results have been published.
Entrant emails	Multi	Entrant lists selected from multiple congresses/events
	Congress	Entrant list for a congress (initiated from Congress management area)
	Event	Entrant list for an event (initiated from Congress management area) Unpaid entries for an event (initiated from Congress management area)
	Entry	Notifications about new/changed entries.
Session emails	-	Everyone who attended one or more sessions

Note that this does not cover ALL emails generated by My ABF. This covers ones that are specific to your club. There are others which are not specific to your club which are not visible here. These include:

- Finance related emails sent to users about their own My ABF accounts (low balance warning, bridge credit transfers to/from their account, automatic top-up success/failure).
- Support ticket notifications sent to users.
- Member to member communications (e.g. relating to a congress partnership desk)

10.4. Who can see what buttons?

Exactly what you see on this screen will depend what level of access you have to your club.

If your club uses simple role based access control then anyone with access to the club admin menu will see all 3 buttons.

If your club uses advanced role based access control then which buttons you can see will depend on which role(s) you have:

- Compose Club Email: A member of the Manage communications group
- Compose Multi-Event Email: A member of the Manage Congresses group
- Compose Session Email: A member of the Directors group

10.5. What email addresses get used

It is important to understand what email addresses My ABF sends to because it is affected by the nature of the player's My ABF user account. There are two fundamental types of user in My ABF:

<table>
<tr><td>1</td><td>Registered My ABF user</td><td>These are users who have themselves registered for a My ABF account. They therefore have a personal profile where they already maintain their own details which includes an email address. Any club membership records that exist for them are separate and do contain an email address.

Players can for convenience, however, elect to share the email address from their personal profile to any club membership records they have in My ABF.

Which email address gets used?
Club emails are sent to the email address in the player's membership record with that club (which the player may have chosen to share from their own My ABF profile).
Event emails are sent to the email in the player's My ABF profile.</td></tr>
<tr><td>2</td><td>Unregistered My ABF user</td><td>These users do not have their own My ABF profile. They have been added to the system only by virtue of one or more clubs adding their ABF number and details as a member.

When a club membership record is created in My ABF for them an email address can be set up for them by the club adding them. This is only visible to that club.
Which email address gets used?
Club emails are sent to the email address in the player's membership record.
Event emails are not sent to unregistered users at all (only to registered users).
If member records are imported from the Masterpoint centre any existing email address recorded for the player is imported. Be aware, however, that these records have not typically been well maintained or used in the past. Any email address for a player coming from the Masterpoint Centre system should therefore be reviewed both to check it's a valid email format to start with and that it is up to date for the member in question.

If member records are imported from Pianola, Compscore or a generic csv any email address is also imported. These are more likely to be valid as they have probably been actively used by those systems.</td></tr>
</table>

10.6. Composing and sending a batch email

This Communications screen is the central location for the workflow for all "batch" emails (i.e. emails capable of being sent to multiple recipients).

Functionality includes:

- Ability to use email templates to govern the look and feel of the email
- Ability to apply tags to members to create various mail groups
- Ability to view basic statistics for a mailout (number of bounces, number of read emails, etc)

Templates and how they are used is discussed in more detail in section 10.12 below.

Both tags and templates are created in the Settings area (see section 13.4 below). They are then used in this area.

This workflow consists of up to 4 steps:

1. Select events (multi-event emails) or sessions (session emails) to take entrants from
2. Review recipients (add, amend, etc)
3. Email options (template, reply to address, from name)
4. Email content (subject, text, attachments, etc)

Multi-event and Session emails start at step 1. All other emails start at step 2.

You can use the Previous Step and Next Step buttons to move between the steps or click directly on the buttons across the top to move to that step.

It is also possible to open multiple My ABF browser tabs so that you can keep an email in a draft state in one tab, while fixing up other things elsewhere. Be careful if you do this to refresh the page to update it for changes that may result from actions you have taken elsewhere.

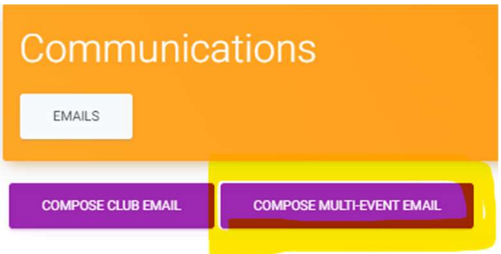
10.7. Email entrants across multiple events /congresses

It is possible to create a "Multi-event" email – i.e. select multiple congress / event combinations and email the entrants from those events. This enables a club to, for example:

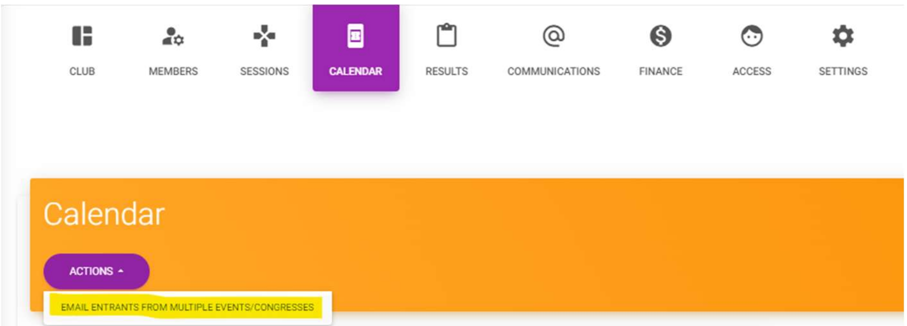
- Email entrants to a particular event or congress over the last few years – perhaps to encourage them to come to the current year's running of that event.
- Email entrants to a number of events or congresses run over a period of time – perhaps to encourage them to come to other events you are running.

There are two ways this sort of email can be initiated from within the Club Admin menu:

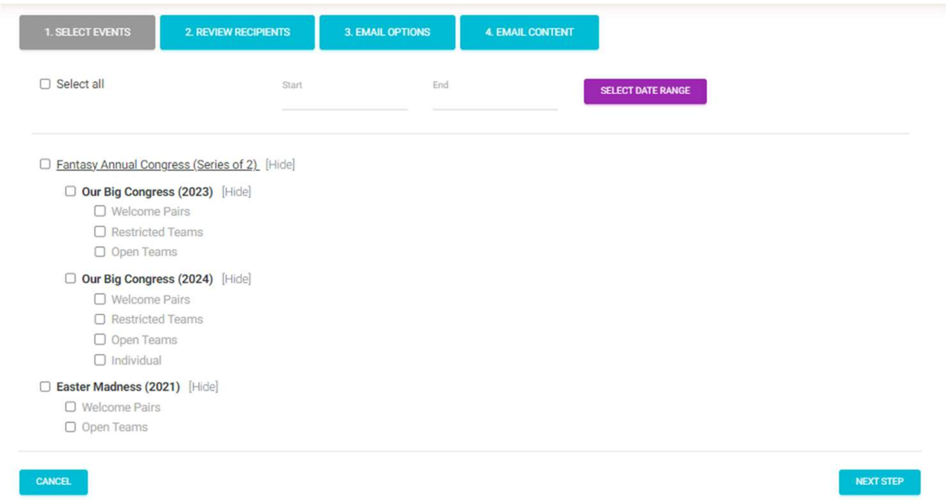
- The Compose Multi-Event Email button on the Communications page:



- An action on the Calendar page:



This then brings up a tree structure listing of all the organisation's events and congresses and enables them to be ticked or unticked to include entrants from the ticked events/congresses. Alternatively you can select a date range and all congresses within that range will be selected:



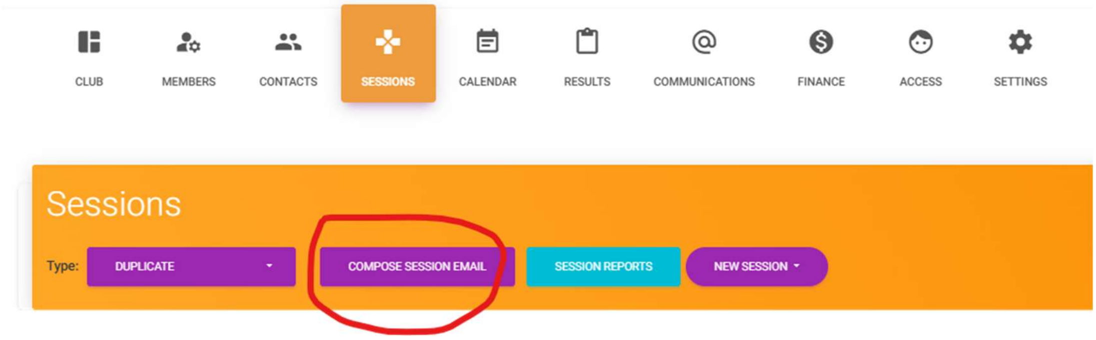
Once this selection has been finalised, you then proceed to the next step of being able to review the recipient list and, if required, amend it.

10.8. Email entrants across multiple sessions

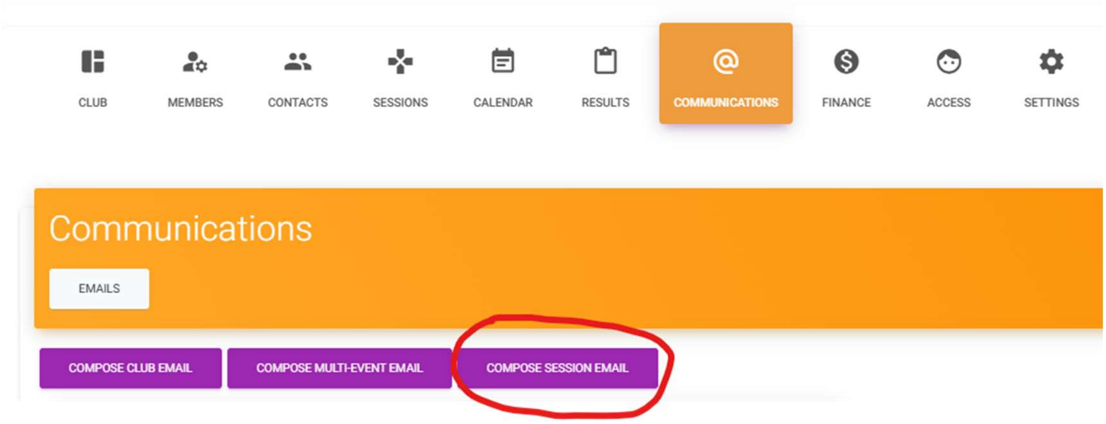
It is also possible for a club to select one or more sessions and generate an email to be sent to all players who played in those sessions.

There are two ways this sort of email can be initiated from within the Club Admin menu (provided the user has access to the relevant area):

- From the Sessions page:



- From the Communications page:

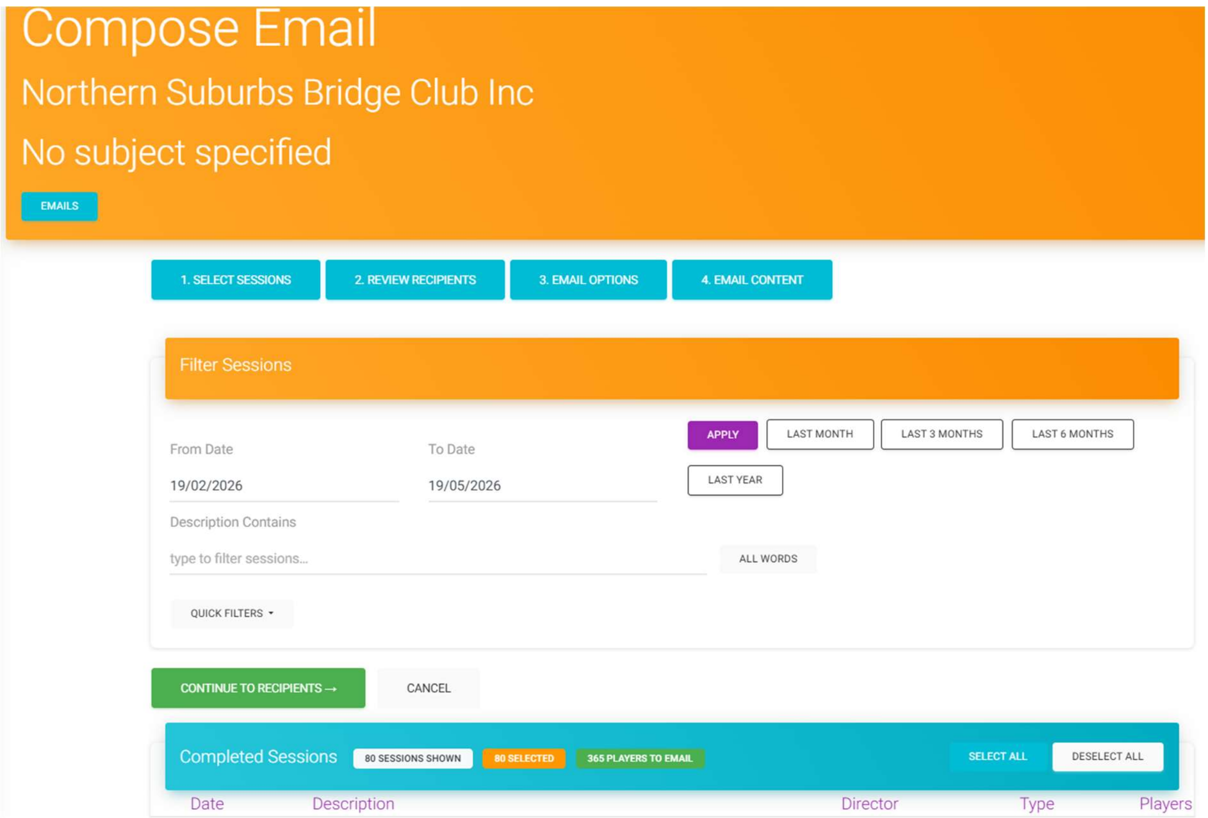


In both cases click the “Compose Session Email” button. You are then taken to a screen (screenshot on next page) where you can select one or more sessions.

There are assorted ways to do this:

1. Select one of the shortcuts for a date range (last month, last 3 months, last 6 months or last year).
2. Manually select a specific date range using the From and To selectors.
3. Filter sessions by a description
4. Select sessions by a “Quick Filter” (this automatically displays the last 15 session description templates that can be selected from via the drop-down list).

Once you have the list of sessions generated from the filters you can then select any combination of them. By default they are all selected but you can individually deselect any session in the listing. You can also select all, or deselect all. As you do this the number of selected session and the number of unique players to email is displayed.



Once you are satisfied with the selection, click Continue to Recipients. A list of players who attended those sessions will then be generated. This list can be also manually modified if required and then the standard email selections (Template, Reply To, etc) made before composing the email, testing it, and sending it out.

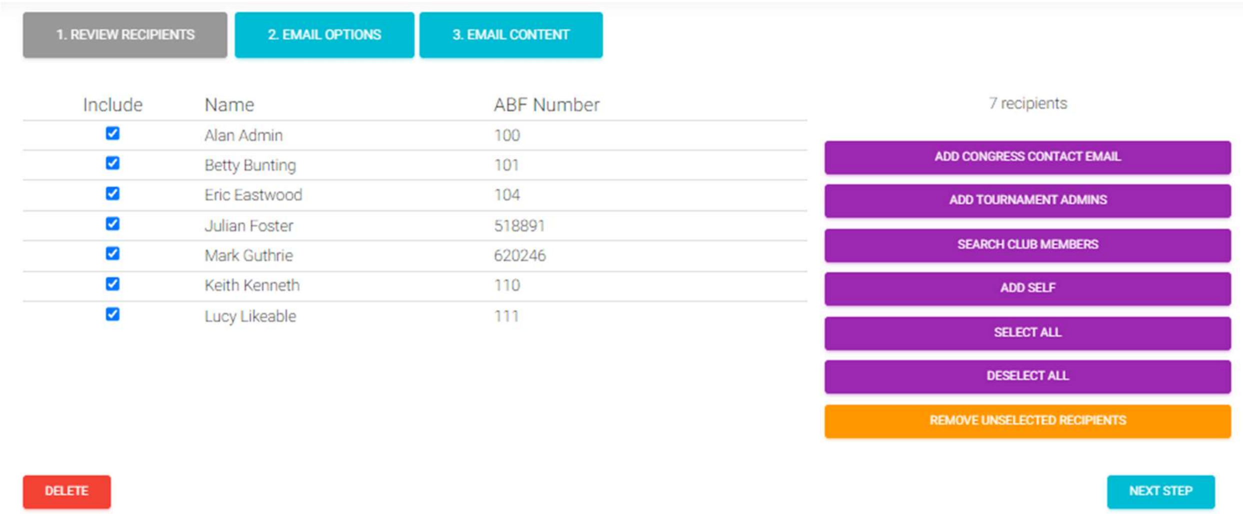
10.9. Review recipient lists

As part of the overall workflow it is possible to review the list of recipients and modify it. Exactly how this is done varies depending on the email type.

10.9.1. Entrant emails

This type of email always starts with a selection of recipients already there – either resulting from a multi-event email where a choice of events/congresses has been made or by an action initiated from within a particular Congress management area (e.g. selecting to email a congress, email an event or email all unpaid entrants to an event).

That initial list is displayed and it is then possible to amend the recipients list in a number of ways:



For this type of email it is possible to add the Congress contact email, add all tournament administrators for the organisation, add a specific club member or add yourself.

It is possible to individually untick people to remove them from this mailout if desired. Select All and Deselect All can also be applied to the list. The "Remove unselected recipients" button allows the display to be cleaned up by removing all those unticked.

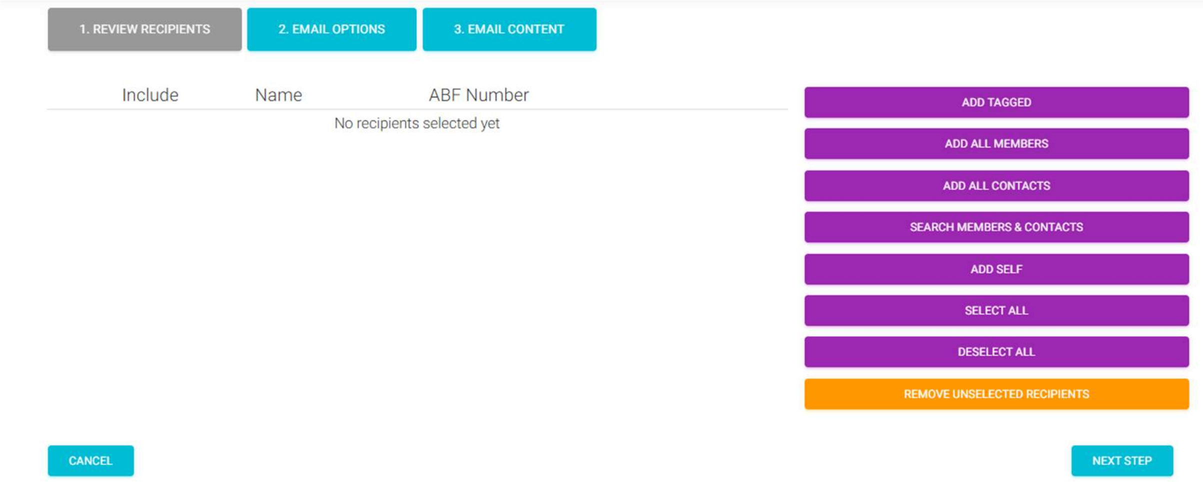
Additional email addresses cannot be added to this list – but a new Contact with that email address can be created and then added here.

10.9.2. Session emails

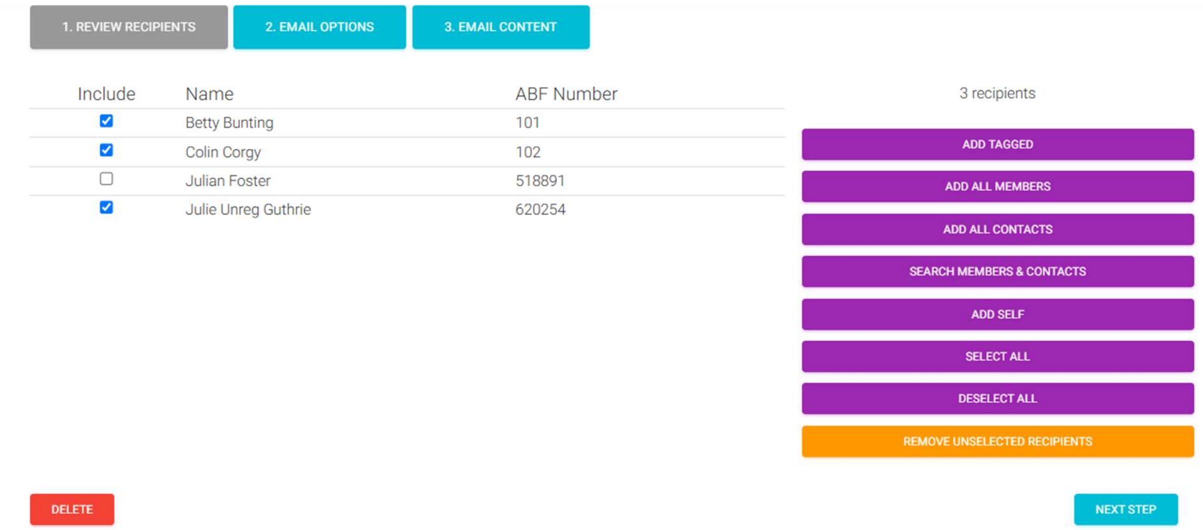
This type of email also starts with a selection of recipients already there – resulting from a choice of one or more sessions. The list can then be modified in the same way as for Club emails described in the next section.

10.9.3. Club emails

For this type of email there are no recipients initially selected. This step is where you create that list. It is possible to add a group of members or contacts identified by tag (for more information on tags, see Settings section 13.4.1 below), add all club members, all club contacts, search to add one individually, and add yourself.

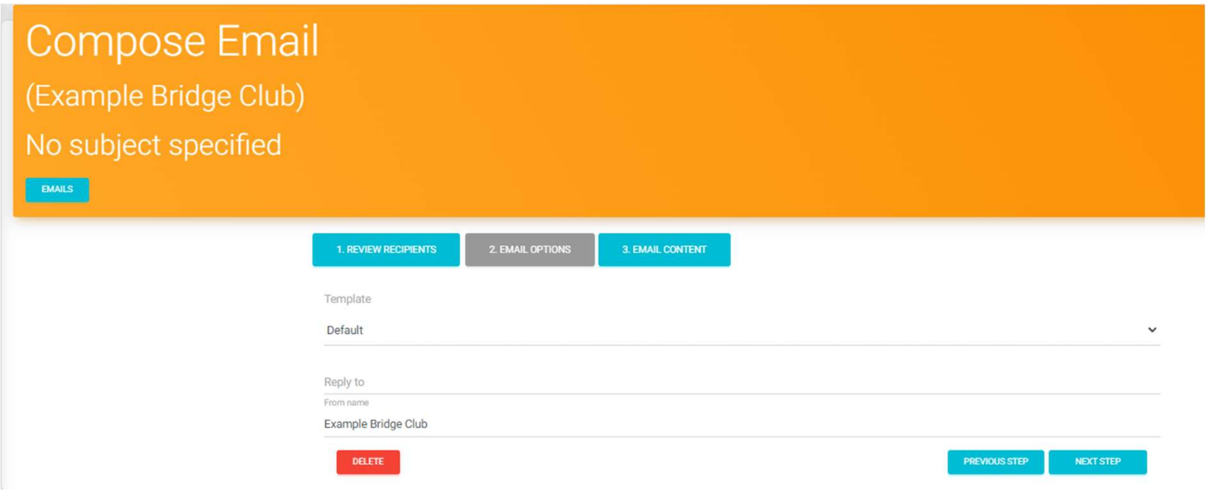


Once a group has been selected the list is displayed and it is possible to individually untick people to remove them from this mailout if desired. Select All and Deselect All can also be applied to this list. The “Remove unselected recipients” button allows the display to be cleaned up by removing all those unticked.



Additional email addresses cannot be added to this list – but a new Contact with that email address can be created and then added here.

10.10. Email options



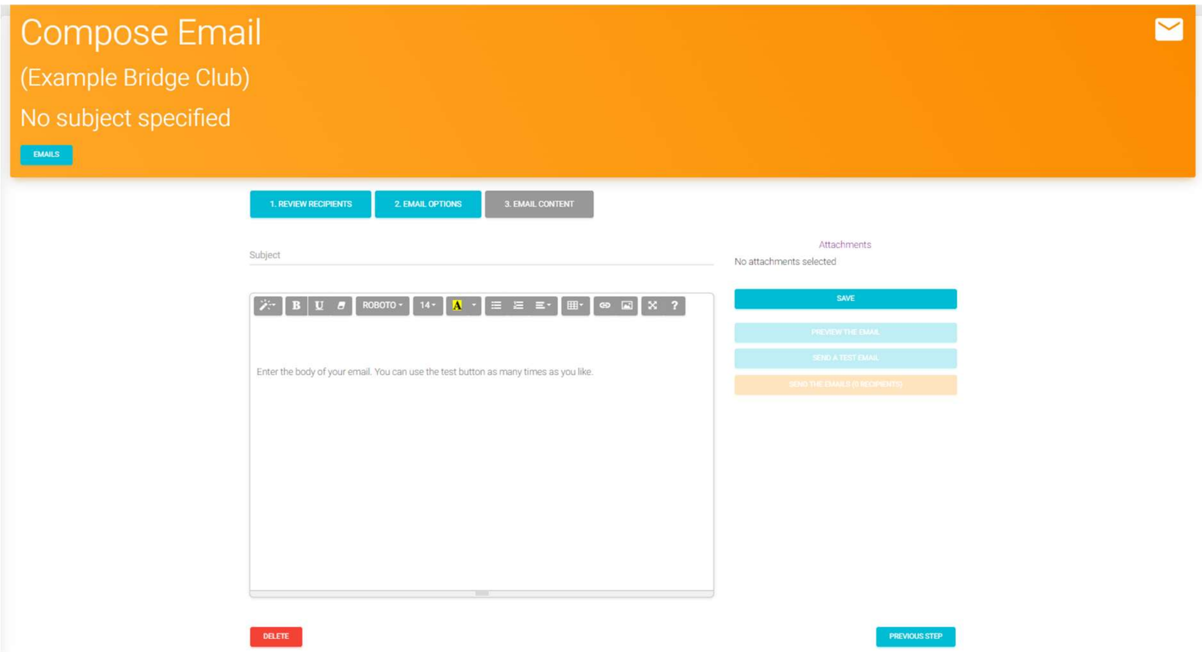
Select the email template to be used, the reply to address (i.e. the email address any responses to the message will go to) and the name you want the email to come from (this defaults to the club name).

A template can be used to govern the look and feel of outgoing emails from your club. It can include:

- A banner image
- A colour scheme
- Footer text
- Reply to address
- From address

See section 10.12 below for more details.

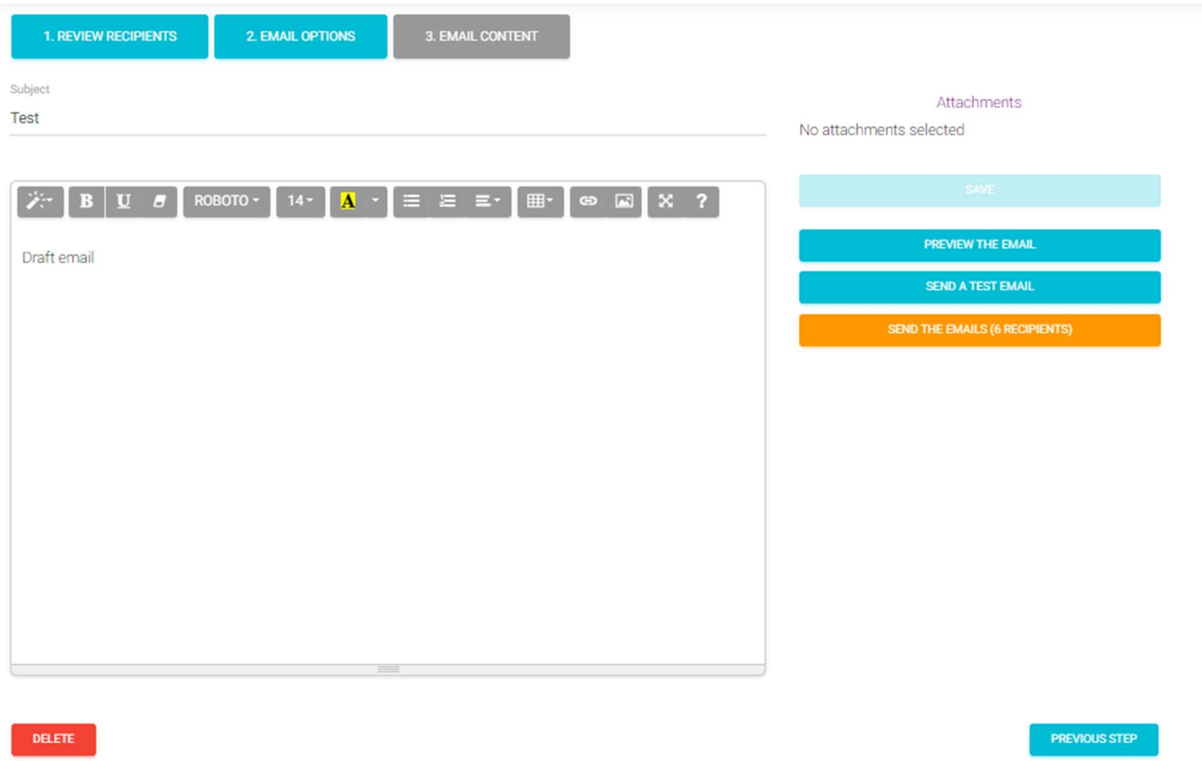
10.11. Email Content



Add the Subject and the body text for the email (which can be formatted using the blue control bar). Attachments can be added by using the link at the top right.

Click Save when the draft email is ready.

At this point you can preview the email, sent a test email to yourself, or send the email to the selected recipients.



10.12. The use of email templates

It is possible to create custom templates for your club. These govern the look and feel of your outgoing emails.

NOTE 1: Clubs do not have to use templates at all. If no templates are created there is a My ABF standard which is applied to all outgoing emails anyway.

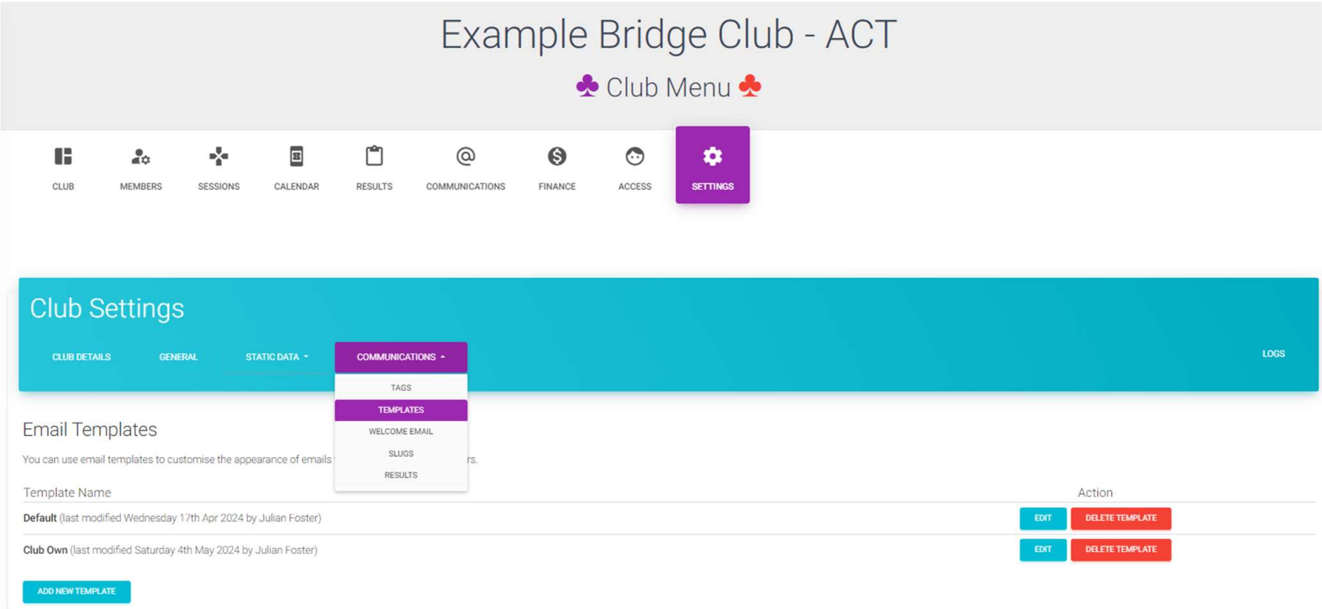
NOTE 2: It is important to understand that a template is NOT the same as a draft email. It governs assorted aspects of an outgoing email – primarily look and feel. But it is NOT a saved email with text content (there are, however, a couple of special types of email where text can be saved – these are described below in section 10.13).

10.12.1. General email templates

A template includes the following elements:

- A banner image used as a header in the email
- Colour choices (used for the subject box and text)
- Footer text (used at the bottom of the email)
- Specification of the "From name" (i.e. who the email will appear to have come from)
- Specification of a "Reply to" address (i.e. where an email will go if a recipient replies)

Templates are created through the Settings – Communications area of the Club Admin menu:



See section 13.4.2 below for details of how to create, edit and save templates.

10.12.2. Template naming and rules for what template is used

Because a club can create multiple templates, there are some rules that govern which is used when. There are also some specially named templates.

General rules

- Where a club has not created a template the My ABF standard will be applied to all outgoing emails from the club (Congress, Club, Results, Welcome, etc).
- Where a club has created one template (whatever it is called) it will be applied to all outgoing emails from the club (Congress, Club, Results, Welcome, etc).
- Where a club has created more than one template then the naming conventions used below may govern which is to be used. If neither of the special names exist, then the My ABF standard will be applied (which can be changed for some, but not all, email types).

Specially named templates

- **Results:** If a template is created and saved with the name "Results" (case insensitive) then it will be used for results emails – regardless of whether there are other templates in existence.
- **Default:** If a template is created and saved with the name "Default" (case insensitive) then it will be used for all outgoing emails – except Results where that exists separately.

When templates can be chosen at the time of composition

Templates can be chosen when creating a batch email (Club or Congress related).

Templates cannot be chosen when emails are generated automatically as a result of other actions in the system:

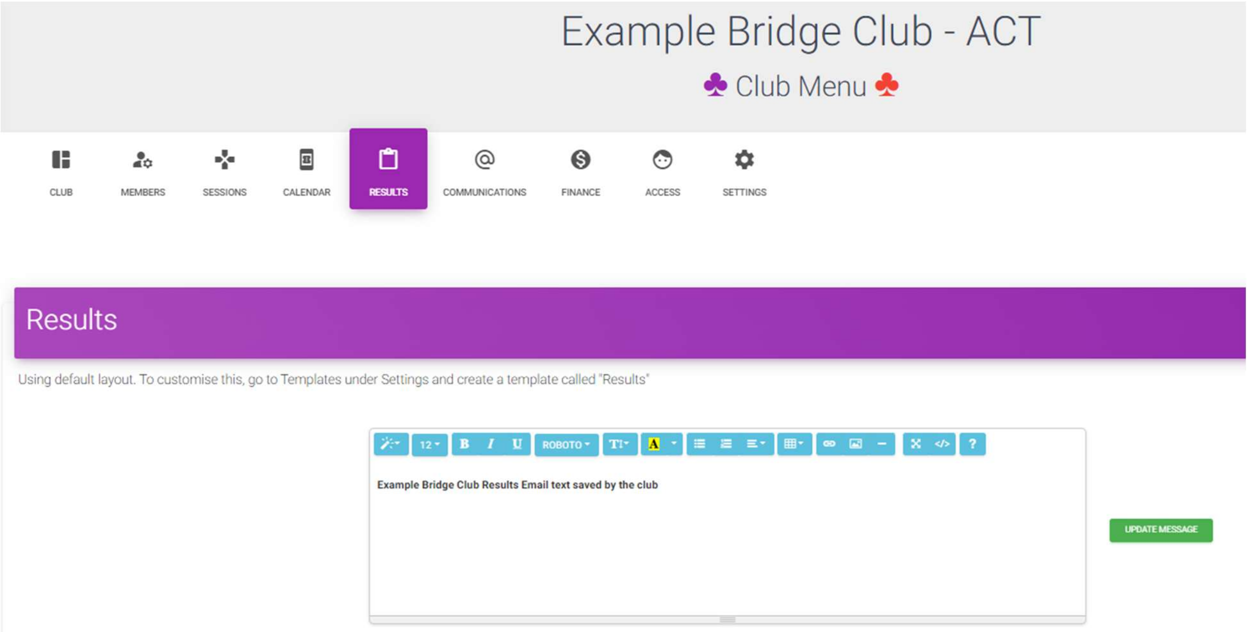
- Congress entry notifications
- Club admin (e.g. finance)
- Sending results
- Sending the welcome email

10.13. Special email types (with saved text content)

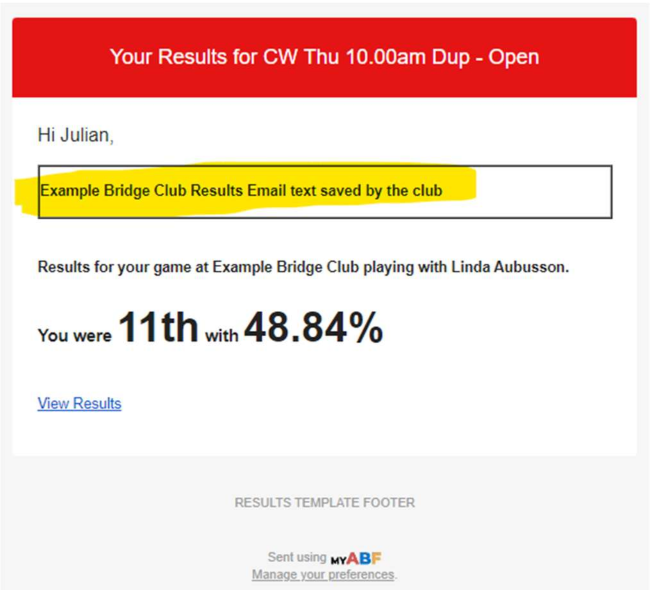
Although a template itself does not include saved text there are two special types of email sent by clubs where it is possible to save text content.

10.13.1. Results email

In the Results tab of club admin it is possible to save some text content to be included in a results email sent to players.



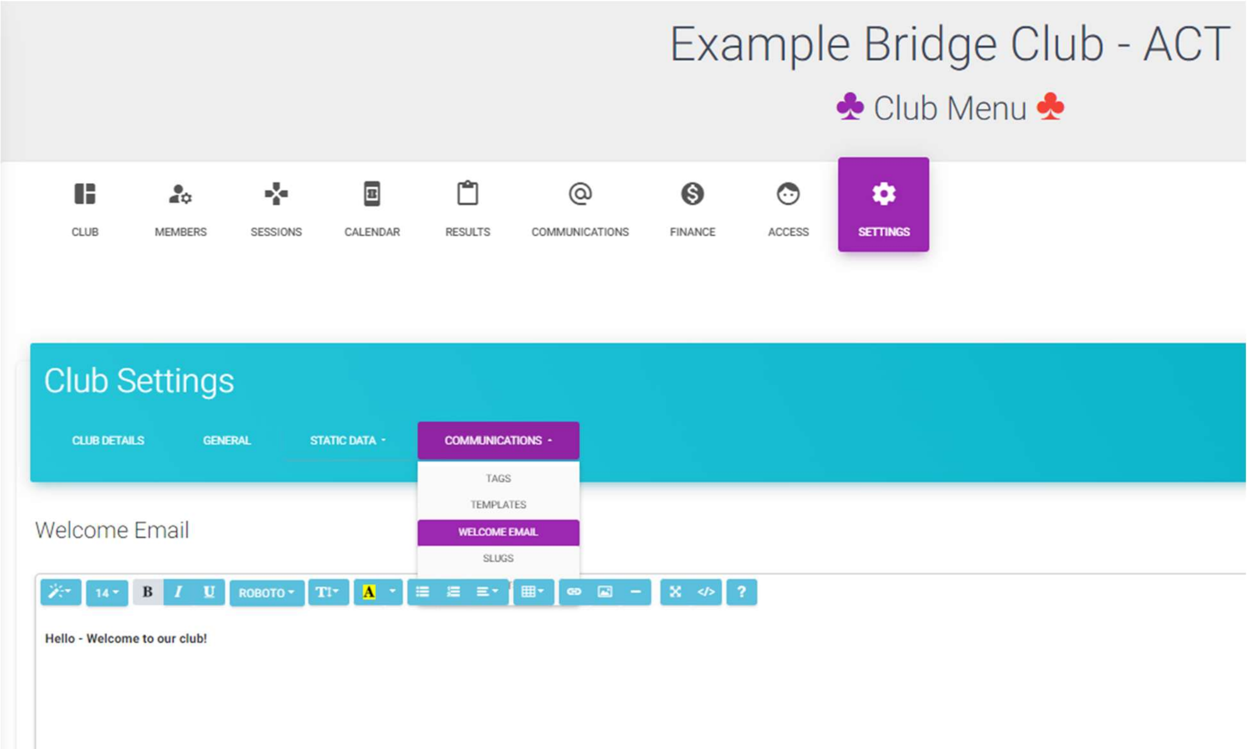
An outgoing results email from the club then includes this text in a box at the top alongside other automatically generated elements for the player's results:



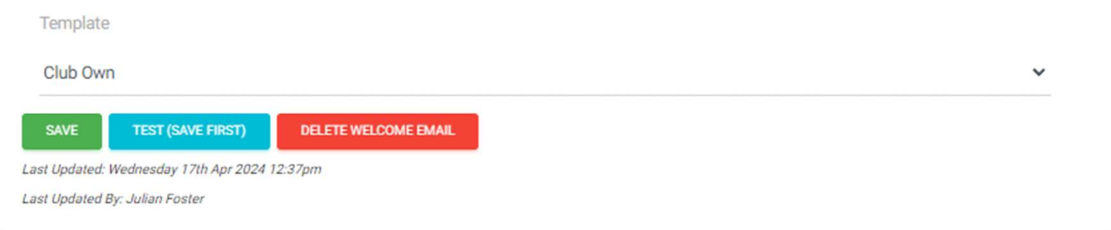
It is also possible to define a separate club template to be used for these if required.

10.13.2. Welcome email

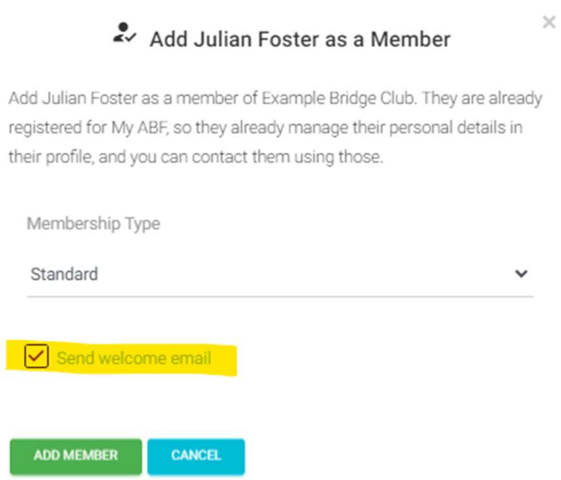
In the Settings – Communications area of Club Admin it is possible to prepare a Welcome email.



If the club has set up their own templates then they can select which should be used for the Welcome email:



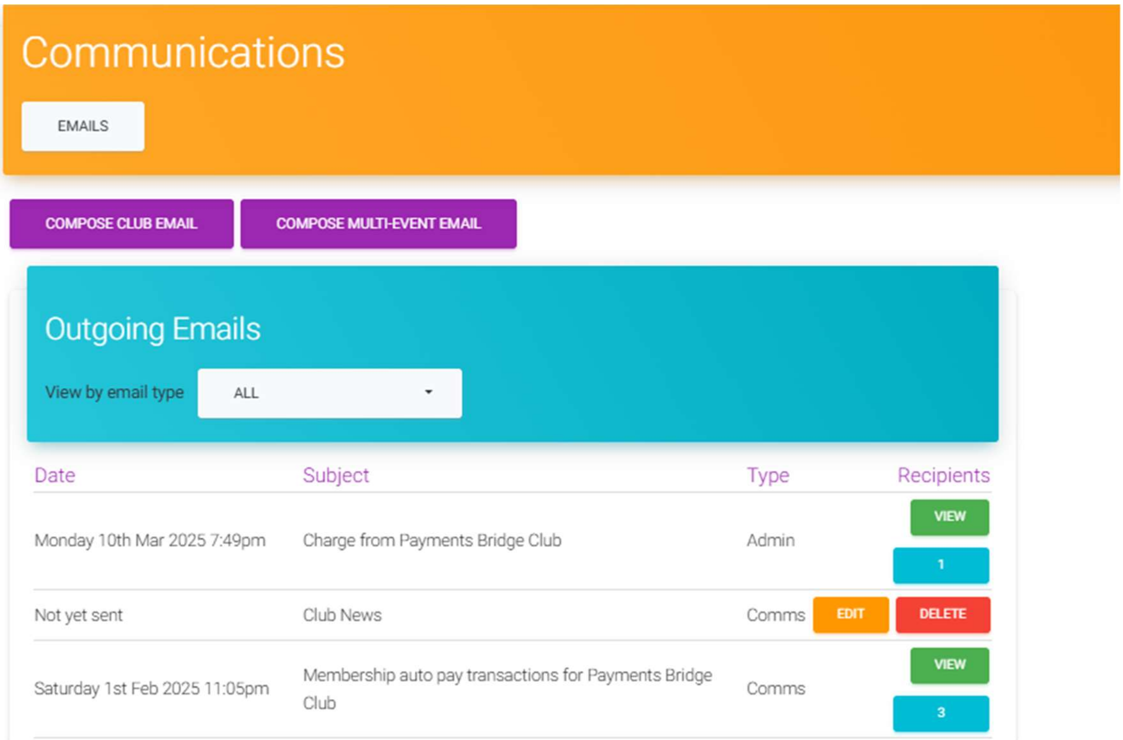
When a new member is added to the club there is an option to have this welcome email sent to them:



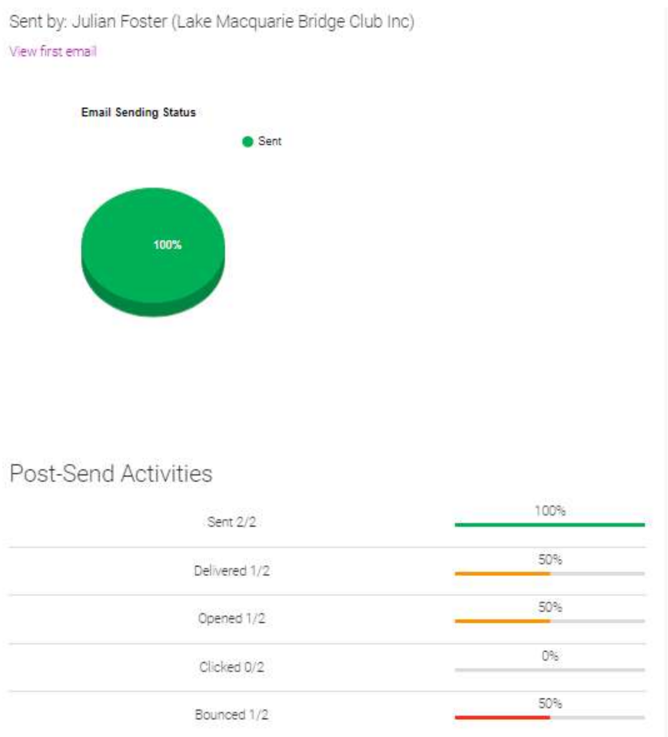
10.14. Reviewing outgoing emails

The main screen displays a list of outgoing emails. This list can be filtered by the email type (your level of access will govern which options are available to view).

Emails that have been drafted but not yet sent are also visible here and can be opened for further editing or deleted.

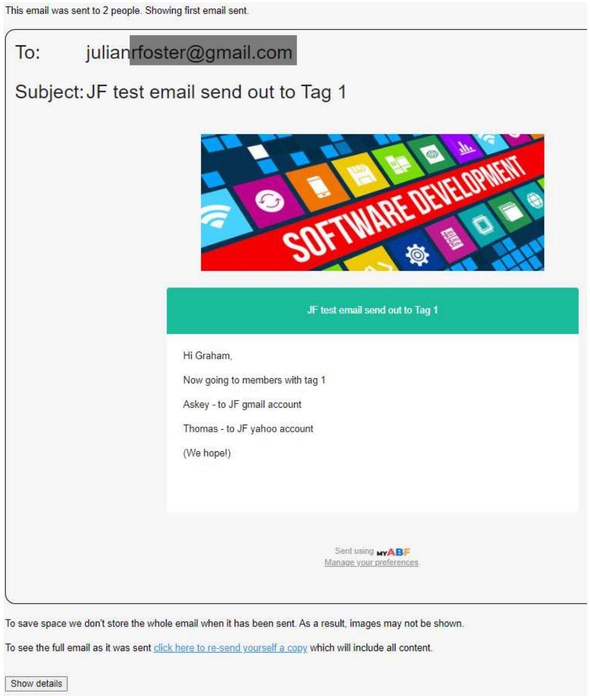


Clicking on View will bring up more details about the email:

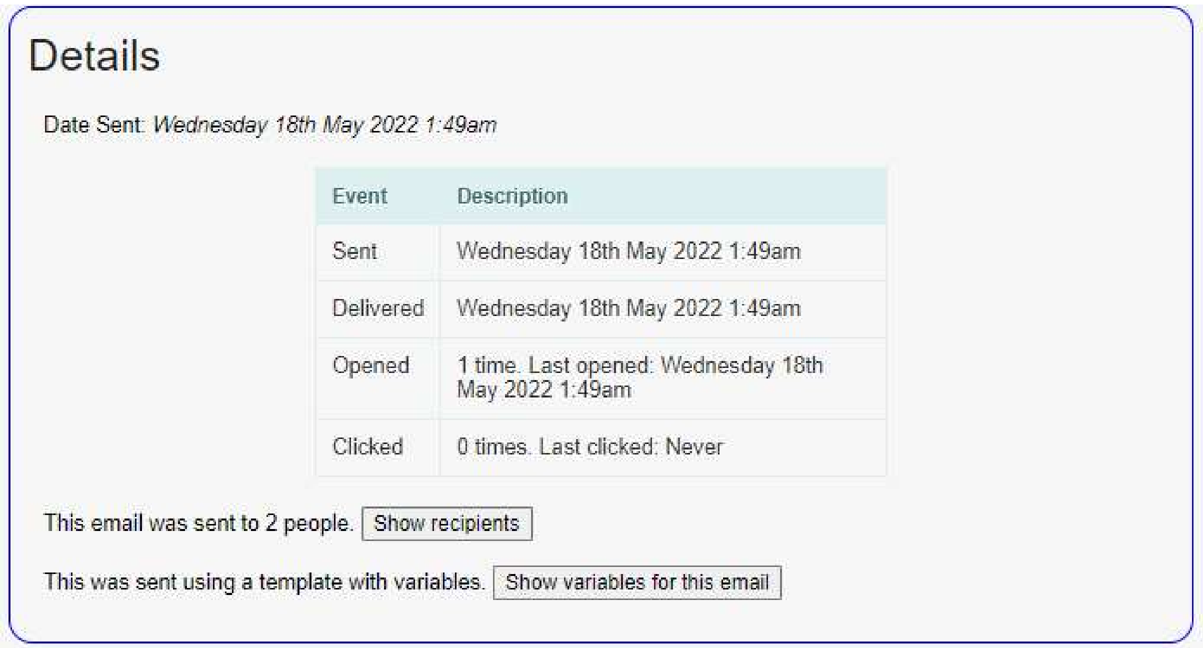


This shows some basic statistics for the email sent including how many were sent, delivered, opened, clicked and bounced.

Click on View first email to see the first email sent out in this batch:



At the very bottom it is possible to click “Show details” to see statistics about this particular email. Where available this will show further details about the batch:



Details

Date Sent: *Wednesday 18th May 2022 1:49am*

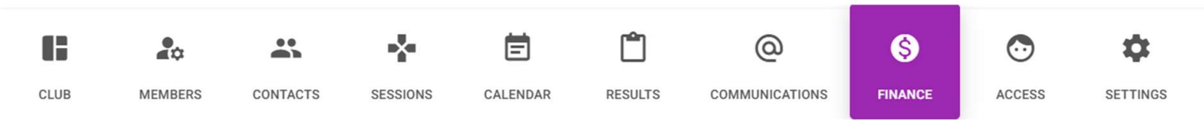
Event	Description
Sent	Wednesday 18th May 2022 1:49am
Delivered	Wednesday 18th May 2022 1:49am
Opened	1 time. Last opened: Wednesday 18th May 2022 1:49am
Clicked	0 times. Last clicked: Never

This email was sent to 2 people. Show recipients

This was sent using a template with variables. Show variables for this email

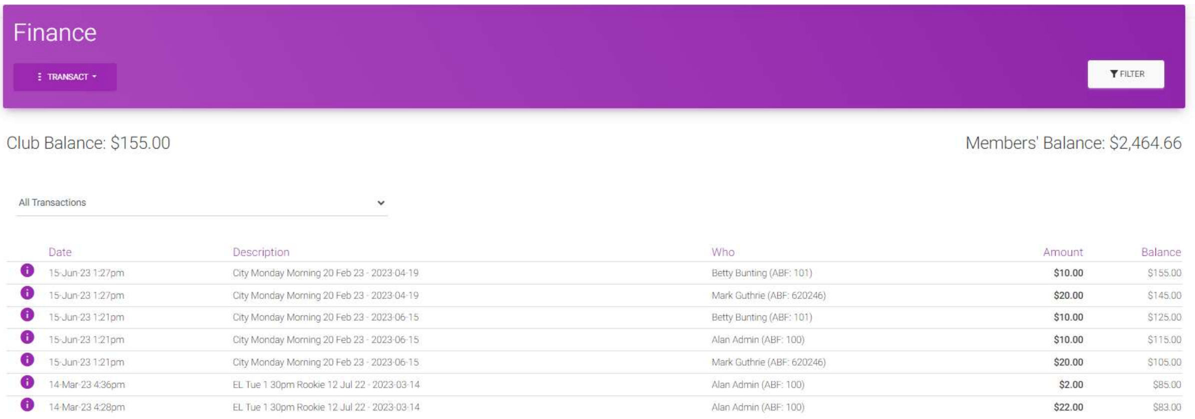
This also shows more detail about the delivery of this particular email, who else it went to, and the template used.

11. Finance



This is the primary way for a club administrator with financial access to open the club's bridge credits statement.

11.1. Bridge credits statement



A summary of the club's balance and most recent transactions is shown. The total bridge credits balance of the club's members is also displayed although a club administrator cannot access an individual member's statement as that is confidential.

Within the header it is possible to transact with members (see next section) or to filter the statement further.

11.2. Summarising the statement

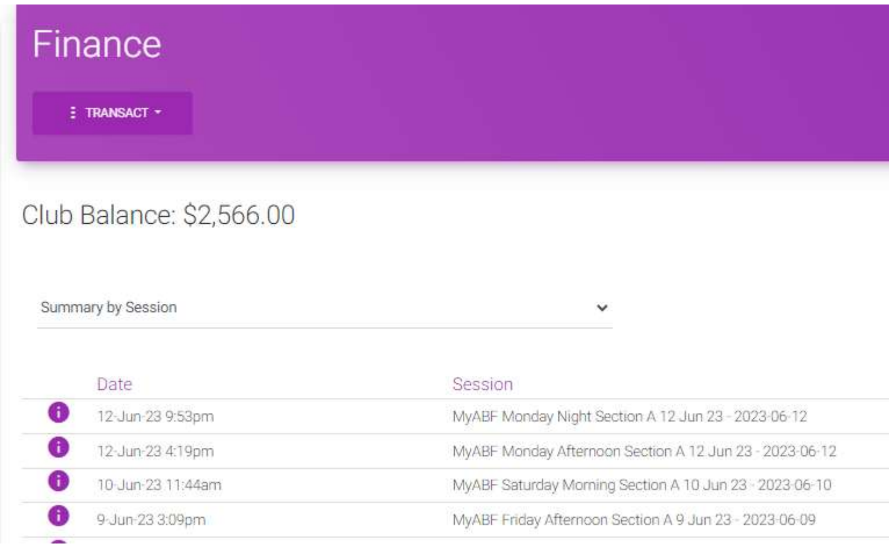
Club bridge credit statements can become very long, especially if club session payments are being used where there can be many line items for a single session. When viewing a club's bridge credits statement through the Finance section of the Club Admin menu it is now possible to summarise it.

Under the Club Balance, there is a 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).

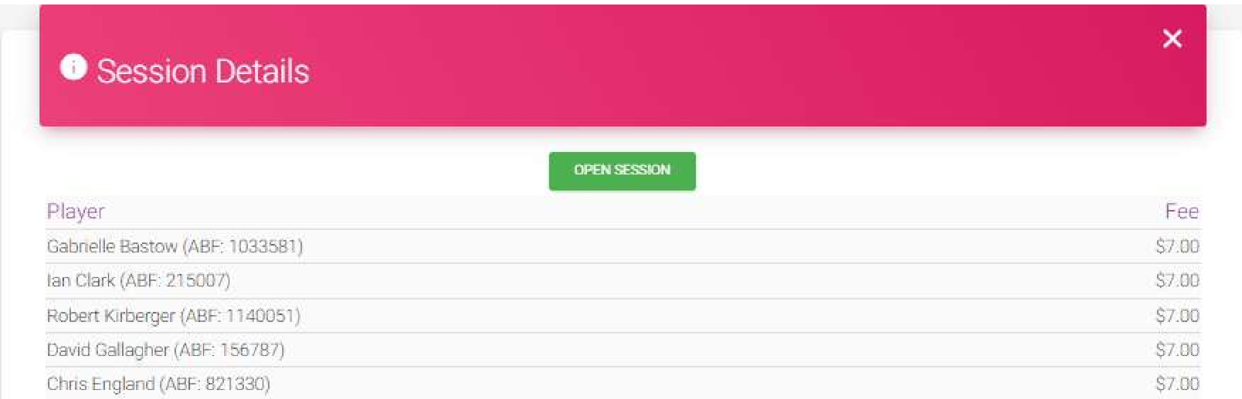
This summarisation is just for immediate convenience when viewing. For more detailed functions (use of date ranges, search and export) use the Filter view.

11.2.1. Summary by Session

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



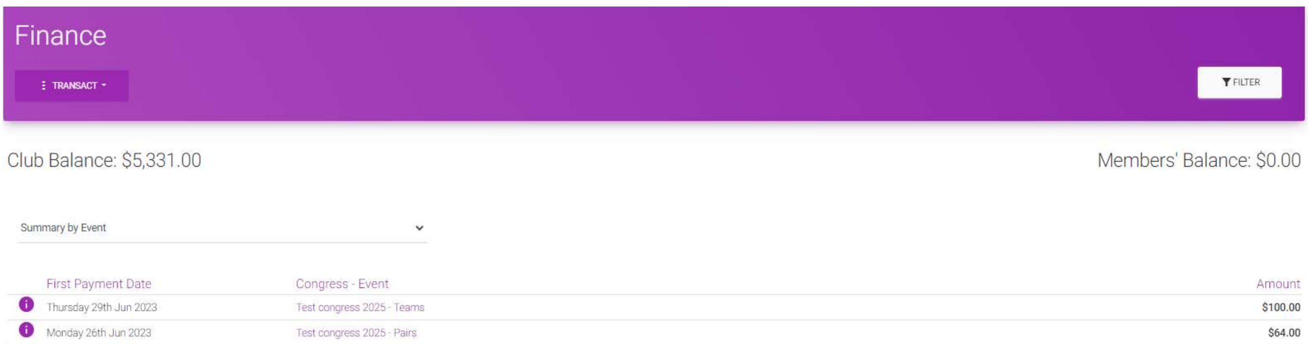
Click on the line item to expand it to show all the transactions for that Session:



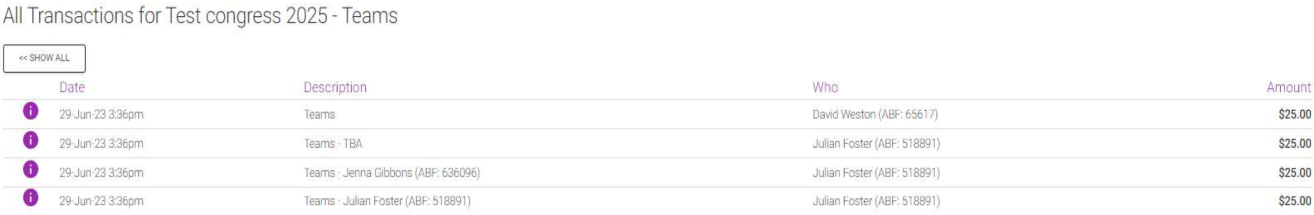
Click Open Session to go to the session detail screen.

11.2.2. Summary by Event

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



Click on the event name to expand it to show all transactions associated with that event:


All Transactions for Test congress 2025 - Teams

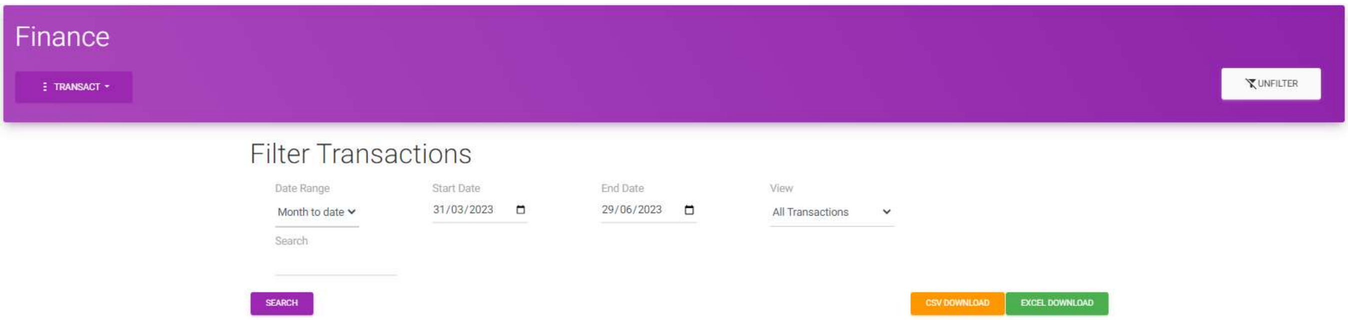
<< SHOW ALL

	Date	Description	Who	Amount
i	29-Jun-23 3:36pm	Teams	David Weston (ABF: 65617)	$25.00
i	29-Jun-23 3:36pm	Teams - TBA	Julian Foster (ABF: 518891)	$25.00
i	29-Jun-23 3:36pm	Teams - Jenna Gibbons (ABF: 636096)	Julian Foster (ABF: 518891)	$25.00
i	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.

11.3. Filtering the statement

The transactions in a club's bridge credit statement can be filtered in more detail. 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):



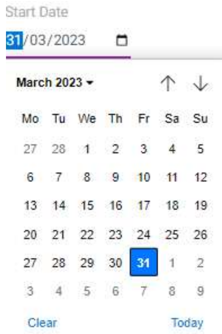
This provides a number of ways to filter the full statement.

11.3.1. Filter by date range

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

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

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.

11.3.2. Search

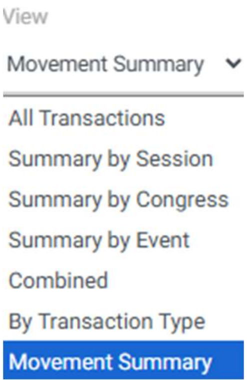
A text search field is also available. This search operates across the Description and the Who columns. Key in what you are looking for and the selections will automatically filter to only display transactions including that text.

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.

11.3.3. Summarise the transactions

It is possible to filter the transactions in multiple ways.



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.

11.3.4. Summary by Session

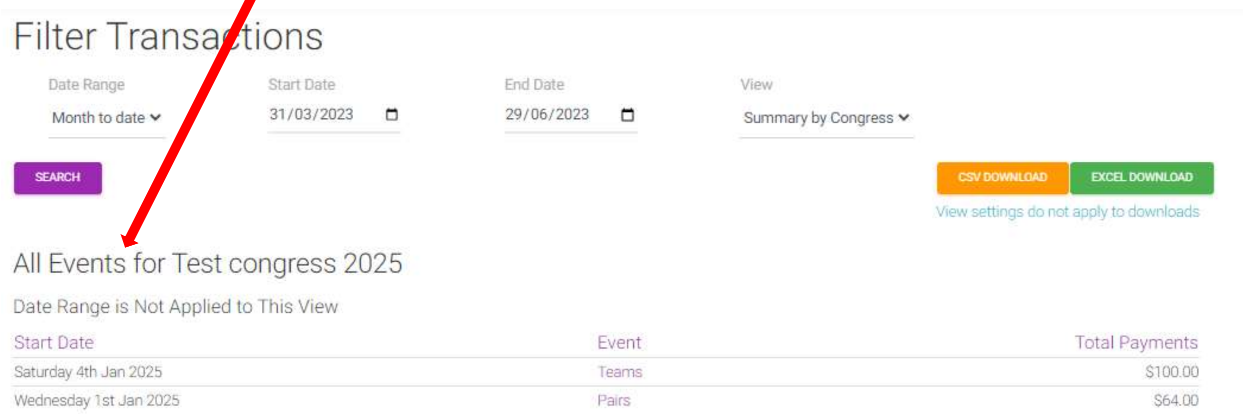
When summarised by Session, the listing shows each Session within the selected date range and its total:

Click on the Session title to go to the session detail page.

11.3.5. Summary by Congress

When summarised by Congress, the listing shows each Congress and its Start Date:

Click on the Congress name to open the list of the Events within that congress:



Click on the Event name to open the list of all bridge credit transactions for that Event (next page):

All Transactions for Test congress 2025 - Teams

Date Range is Not Applied to This View

<< SHOW ALL

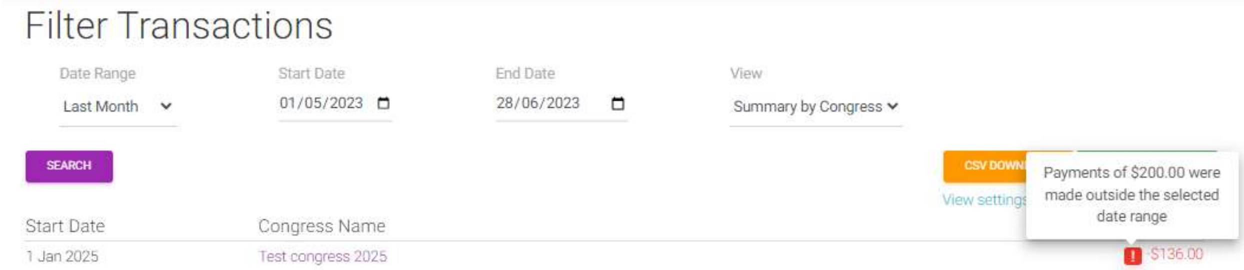
Date	Description	Who	Amount
29-Jun-23 3:36pm	Teams	David Weston (ABF: 65617)	$25.00
29-Jun-23 3:36pm	Teams - TBA	Julian Foster (ABF: 518891)	$25.00
29-Jun-23 3:36pm	Teams - Jenna Gibbons (ABF: 636096)	Julian Foster (ABF: 518891)	$25.00
29-Jun-23 3:36pm	Teams - Julian Foster (ABF: 518891)	Julian Foster (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.

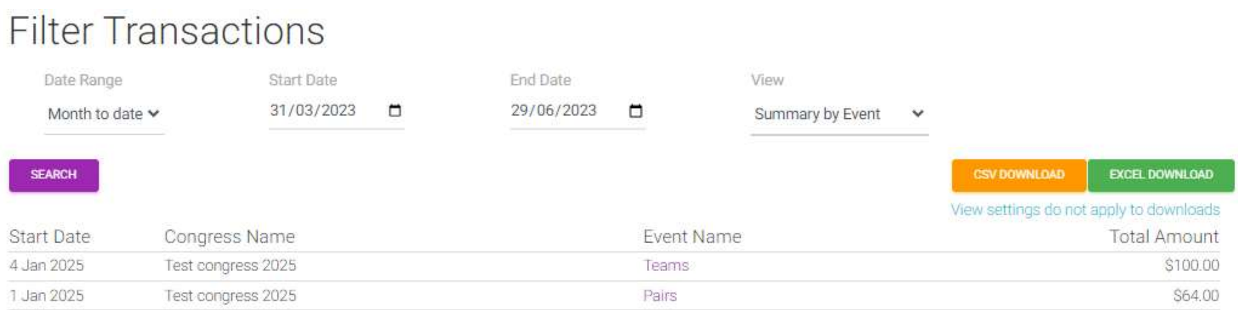


At the detail level the date range is disregarded and all transactions for the Event are shown.

This issue does not arise for Sessions which always occur on a single day only.

11.3.6. 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.



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	$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.

11.3.7. Combined

The Combined view is colour coded to highlight the totals of various common transaction types:

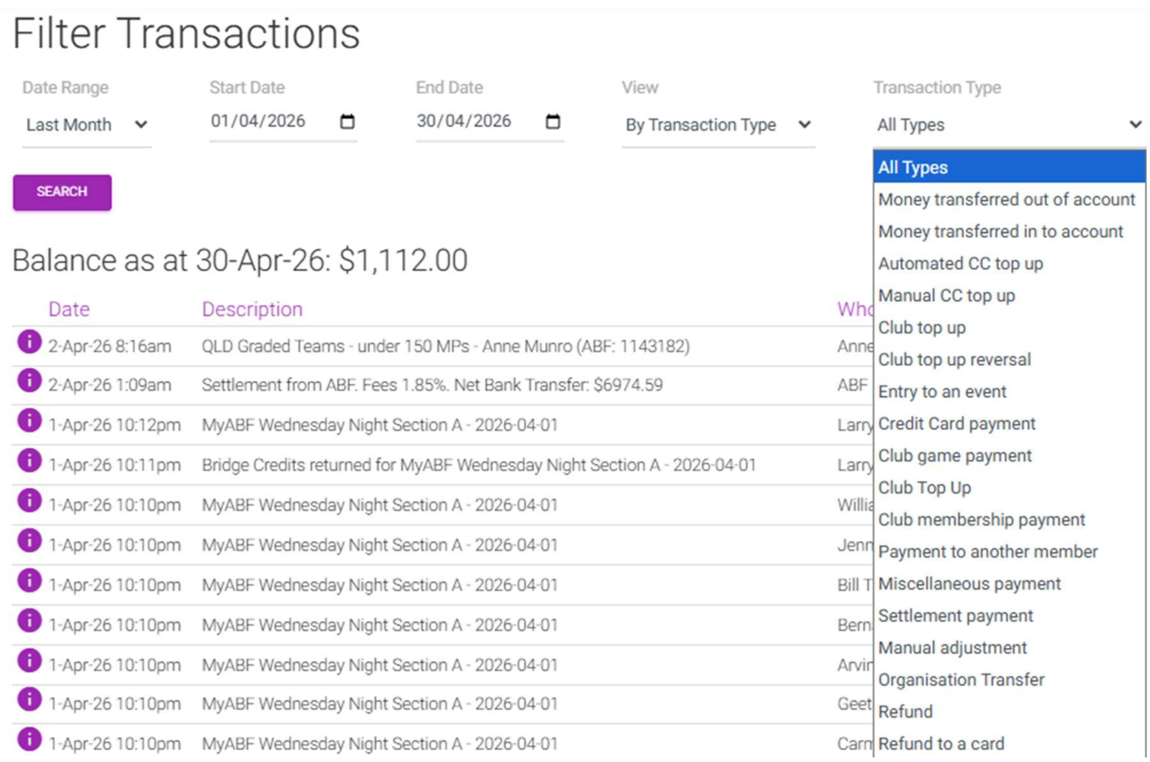
Type	Colour	Image
Event entries	Cyan	15-Jul-23 Event Entries Event Entry
Club sessions	Yellow	21-Mar-25 Session Payments Club Payment Example BC Session 25 Nov 24
Club membership	Light blue	22-Mar-25 Club Members Club Membership Total Club Membership Fees
ABF settlements	Green	2-Jun-23 11:27am ABF

Transactions outside these categories are unallocated and display with no shaded colour background.

There is no drill-down capability from this view.

11.3.8. By Transaction Type

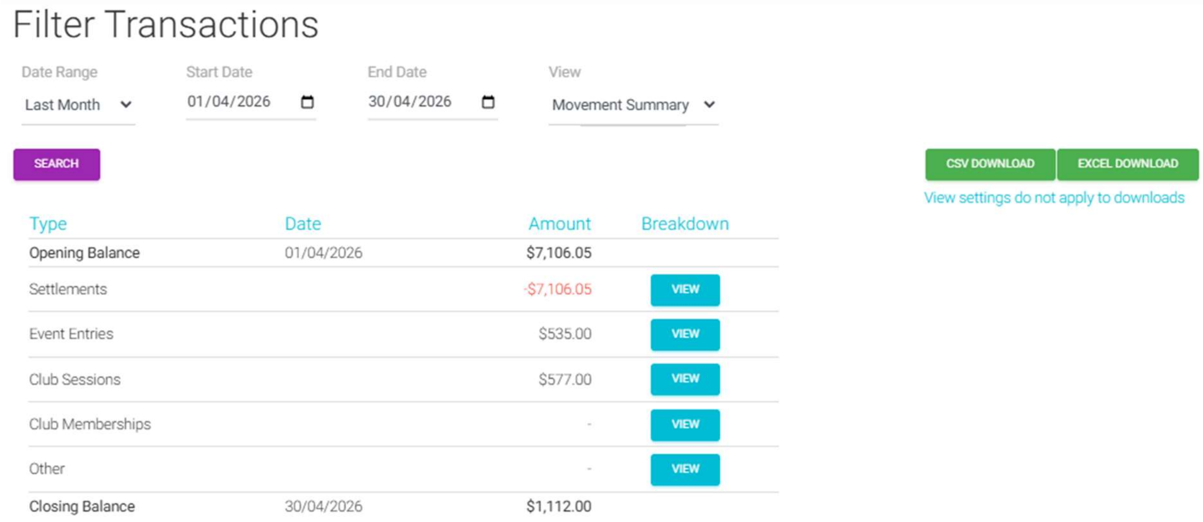
This option enables a filter by any Transaction Type you choose. This opens up an additional drop-down box where you can select the transaction type you want to see. Note that the list presented here is all the possible transaction types that exist – however, some of them are only relevant to an individual's bridge credits account not an organisation's. That means some selections here will always produce no results.



11.3.9. Movement Summary

This provides an overall view of how the club's bridge credits balance has moved between any two selected dates, split across the most common transaction types.

Click the View buttons to see a breakdown of what is making up each component.



11.4. CSV and Excel download

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.

11.4.1. CSV download

The csv download includes transactions in the date range selected and includes columns for Date, Counterparty, Reference, Type, Description, Amount and Balance.

There are also 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).

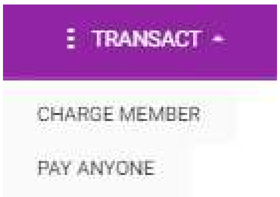
11.4.2. Excel download

The 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)

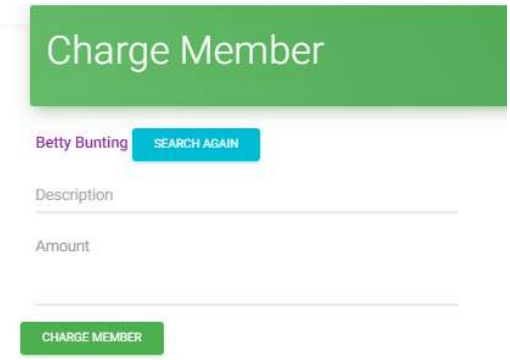
11.5. Charge a member or transfer credits to someone

Click Transact in the header to charge a member or pay anyone.



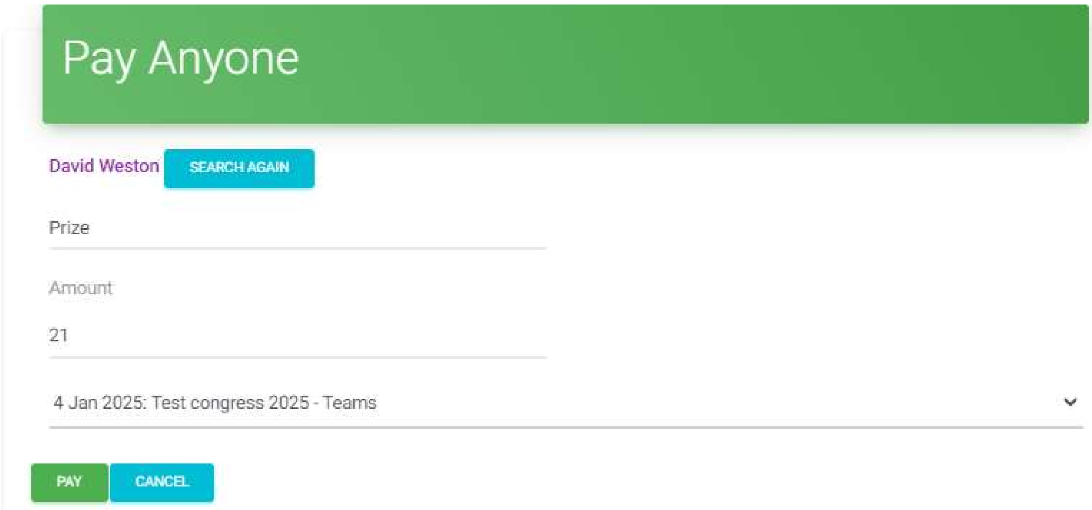
11.5.1. Charge Member

To charge a registered member of the club search for the member, add a description and an amount. Click Charge Member. The charge will be applied if the member has sufficient balance. The charge will be visible in the member's statement and an email notification will also be sent.



11.5.2. Pay Anyone

It is possible to pay any registered user of My ABF. Search for the user, add a description, optionally associate it with a Congress event (see note below) and add an amount.



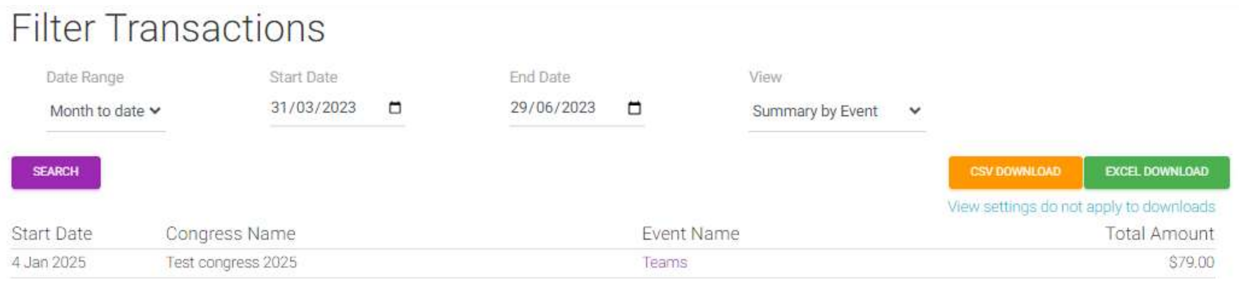
Click Pay. The payment will be made if the club has sufficient balance. The payment will be visible in the user's statement and an email notification will also be sent.

11.5.3. Associating the payment with a Congress event

After selecting the player there is an option to associate the 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. The selection is optional – the transaction can be left on its own if preferred.

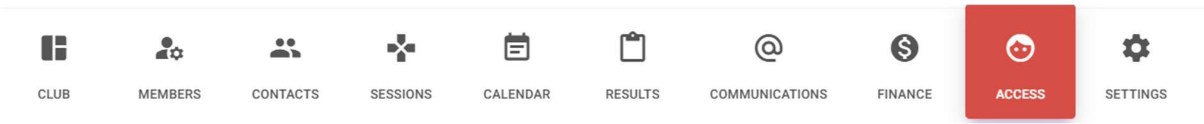
By selecting an Event from the list, however, this transaction will then be associated with it and will be included in the reporting summaries for it:

The total for the event now takes into account the deduction for the prize:



The expanded list then includes the prize transaction:

12. Access



This enables nominated club administrators to control who has access to assorted parts of this club menu.

The area is governed by a concept known as "RBAC" (Role Based Access Control). This works by defining certain roles in the system (which govern what areas can and cannot be accessed) and then creating groups of users who have that role.

12.1. How do I get my club set up?

All ABF affiliated clubs have already been set up in My ABF. Those where no initial administrator has been nominated have been set up with a dummy administrator called "ABF".

When your club wishes to become active in My ABF contact My ABF Support to advise who your initial Administrator will be. Normally that would be the secretary (as listed in the ABF Masterpoint Centre) but it can be anyone the club chooses. The administrator does, of course, need to be a registered My ABF user.

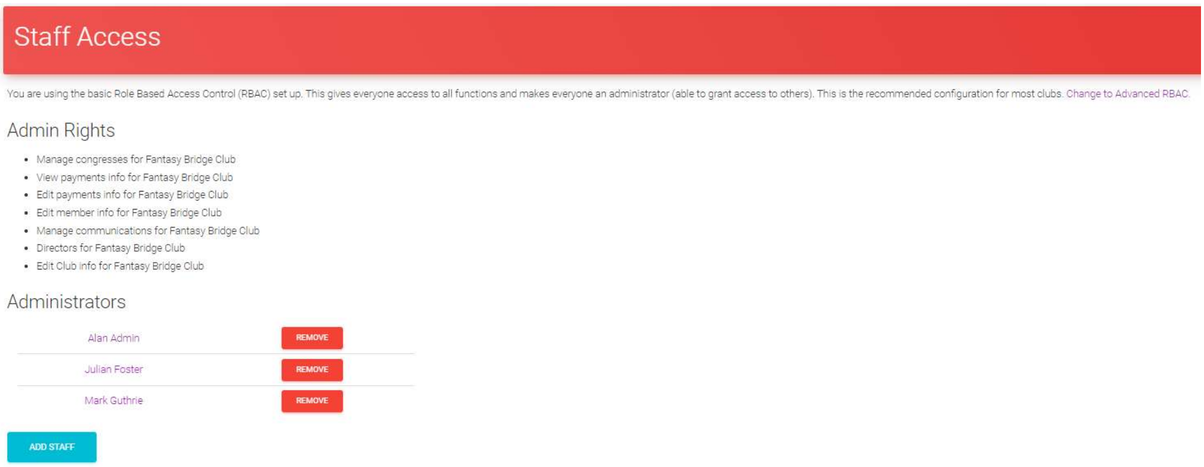
Once access has been given to the initial administrator, an introductory guide is sent to them discussing some things the club may wish to consider early on. The way they manage administration access is one of those things. Initially all clubs are set up with Basic RBAC so that means the initial administrator can then provide access to other people.

There are two overall options that clubs can use to control their access rights:

12.2. Basic RBAC

In this option, there is a single group of administrators and they all have access to all the club administration areas and the ability to change who else has that access. This will be perfectly adequate for most clubs and it is how any new club is set up.

The initial screen looks like this:



To add someone new to the list, click "Add Staff", select the user and click OK.

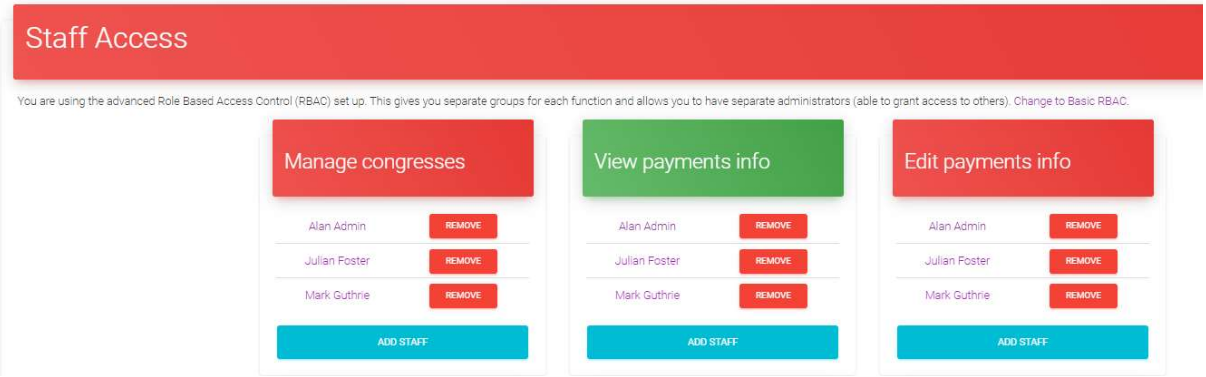
To remove someone from the list click "Remove" and confirm. There always has to be one administrator so it is impossible to remove the last one.

If you wish to change to the Advanced access, click on the link at the top right of this screen .

12.3. Advanced RBAC

In this option, there are separately defined groups of users for different areas. This allows different people to be given access to different areas if desired. This will probably only be needed by larger clubs.

The screen looks initially something like this:



There are 8 specific groups at present:

- Manage Congresses
- View Payments Info
- Edit Payments Info
- Edit Member Info
- Manage Communications
- Directors
- Edit Club info
- Administrators (those with the rights to change people in the other groups)

Staff can be added and removed from the individual groups using the relevant buttons.

The composition of these groups and the exact functionality each gives access to can be refined over time.

Note that the "administrators" group in this setup is nothing to do with Club administration, it's more an IT concept and purely refers to a group of people who have the right to change the list of people with access – i.e. they can add and remove people from these groups. Administrators do not necessarily need to have access to the functionality itself, they just have the right to change who DOES have access. See 12.5 below.

12.4. Relevant roles and the functionality given by them

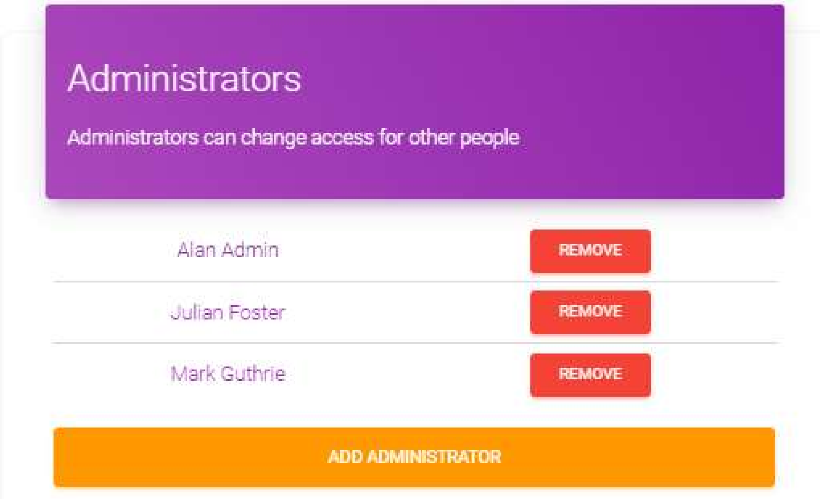
The functionality that is controllable by the various roles is described in the table below. Note this is not set in stone. If you think that the access rights should be different, contact us! Changes can be made.

Role	**Functions available**
Manage Congresses	Calendar area of the menu
View Payments Info	Finance area of the menu. Able to access the club statement but not make any changes – i.e. cannot initiate a Transfer of bridge credits to a member.
Edit Payments Info	Finance area of the menu. Able to access the club statement and all functions on it. Able to access Settings – Static Data - Payment Types
Edit Member Info	Able to add members, edit member details and obtain a csv report of members.
Manage Communications	Communications area of the menu
Directors	Sessions area of the menu. Ability to transact with Registered members' bridge credits accounts.
Edit Club info	Able to edit club details and add venues.

Pages and functions not mentioned in this table are able to be accessed by anyone with any club administration access.

12.5. Who can grant or remove access to someone?

Nominated users with administration rights have the ability to do this. In Basic RBAC there is just one single group so everyone is an administrator. In Advanced RBAC there are multiple groups, one of which is Administrators. This group is shown at the bottom of the screen:

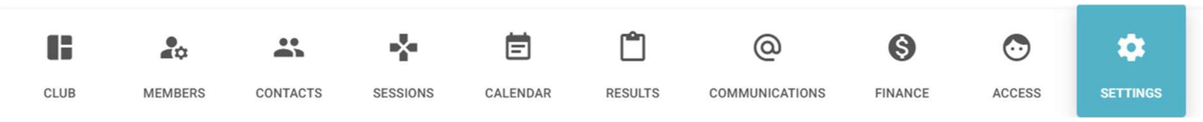


The members of that group are the only ones with the ability to change the composition of other groups – i.e. change who has access to the various areas.

Clubs should give thought to which type of access they want and, if they choose Advanced, should then give thought to who their administrator(s) should be.

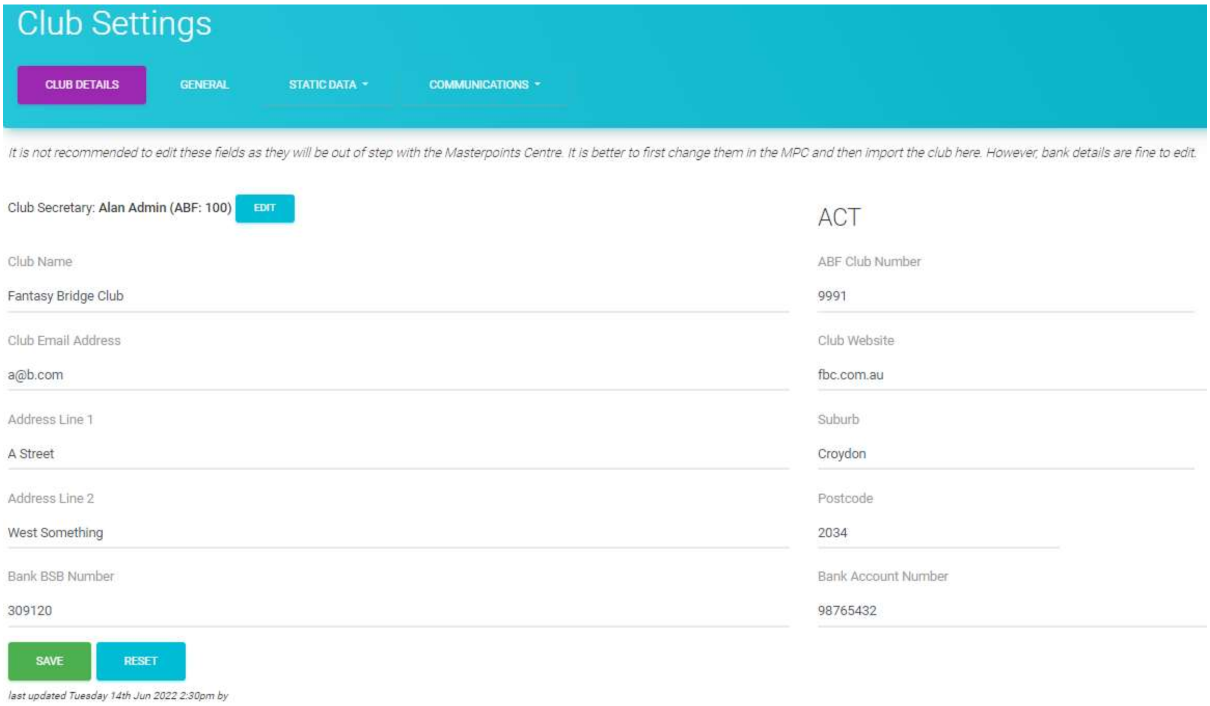
There always has to be at least one administrator so it is impossible to remove the last one.

13. Settings



This section contains various settings to manage the organisation's basic details – these are then used in other areas (primarily members, sessions, and communications). It is split into the following components:

13.1. Club details



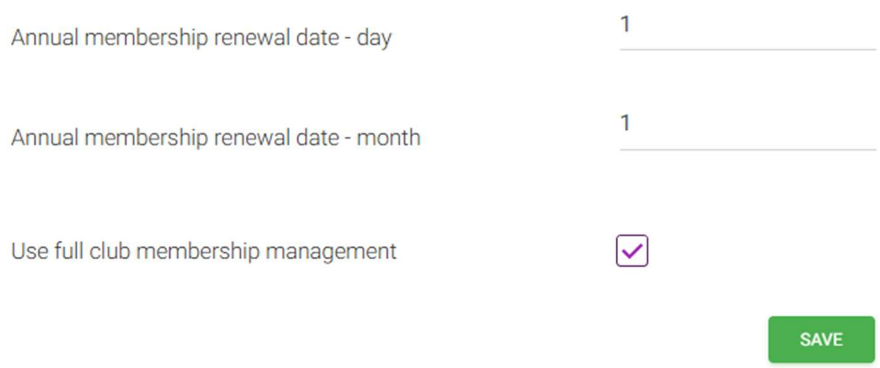
This is where you maintain the basic details for your club (initially populated from the Masterpoint Centre database) and the Secretary. The only new data fields in My ABF are the bank account details for the club (these will be required if the club is running congresses or intending to run sessions with payment through bridge credits).

If using advanced Access control, only users with rights to edit Club info will be able to make changes to this area.

13.2. General

These contain settings pertinent to clubs using Full member management and some relating to using the Club Sessions area.

13.2.1. Membership settings



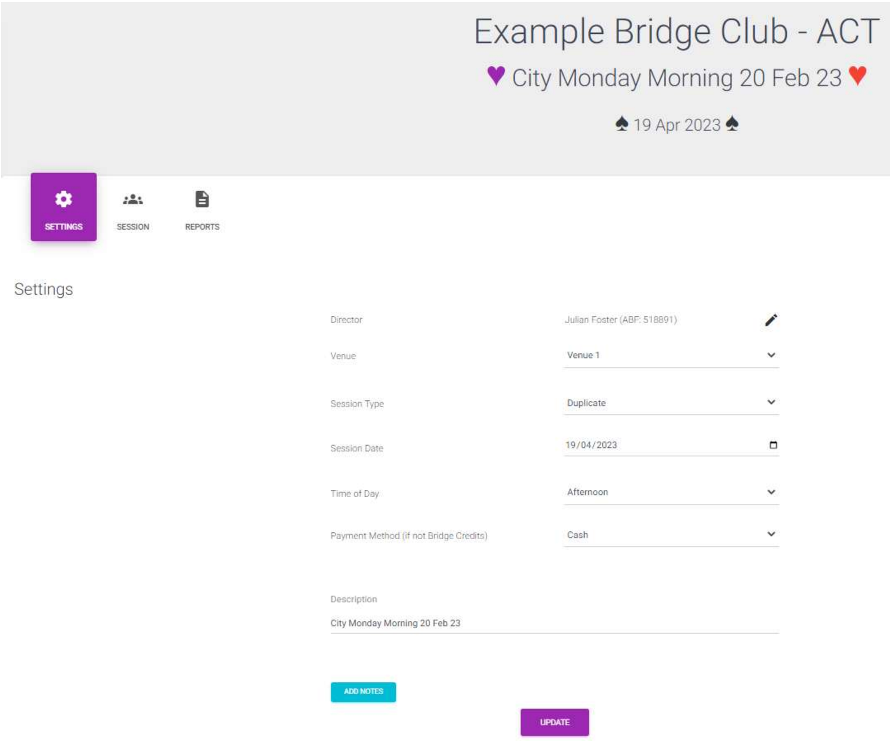
These settings are relevant to clubs wanting to use Full membership management (see 5 above).

Here a club can switch on Full member management. They can also specify the day and month that their membership year begins (the default is 1 – 1 i.e 1 January). This information is used when the system created renewal periods for members.

13.2.2. Venues

If a club operates from more than one venue this is where you can define those venues (which then appear in the information about Club sessions).

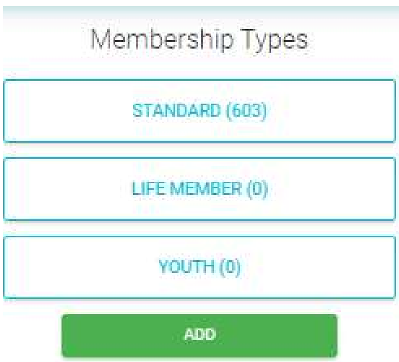
Once a venue has been setup, it is a parameter associated with a session and can be seen in the Settings area for that session:



13.3. Static Data

This section includes 3 different types of static data. These are items which are not expected to change that often once they have been first set up.

13.3.1. Memberships



This is where you define what member types you have and the parameters associated with them. Many clubs will only have one but some could have several – life, honorary, concession, etc. Three have been set up as defaults (which can be edited as desired). Use the Add button to create your own.

It is recommended that clubs set these up accurately even if they are not immediately going to be used as they will most likely be needed in the future.

If you are going to use the functionality to send email to club members, you may wish to set these types up so that you can send messages to just a specific type of member.

If your club charges different table money to different types of member, it is essential your member listing be split by the different types so that this can be calculated properly.

You can specify a Payment period. This is used in member management and effectively represents a "grace period" after the membership end date where the player is retained as a member and their membership only lapses if the renewed period is not paid for by a date that many days after the year end (it defaults to 31 so it would offer 31 January as a grace period date for a 1 January renewal).

You can also mark a membership type as "Never expires". This is suitable for Life or Perpetual members for whom an annual renewal payment is not required.

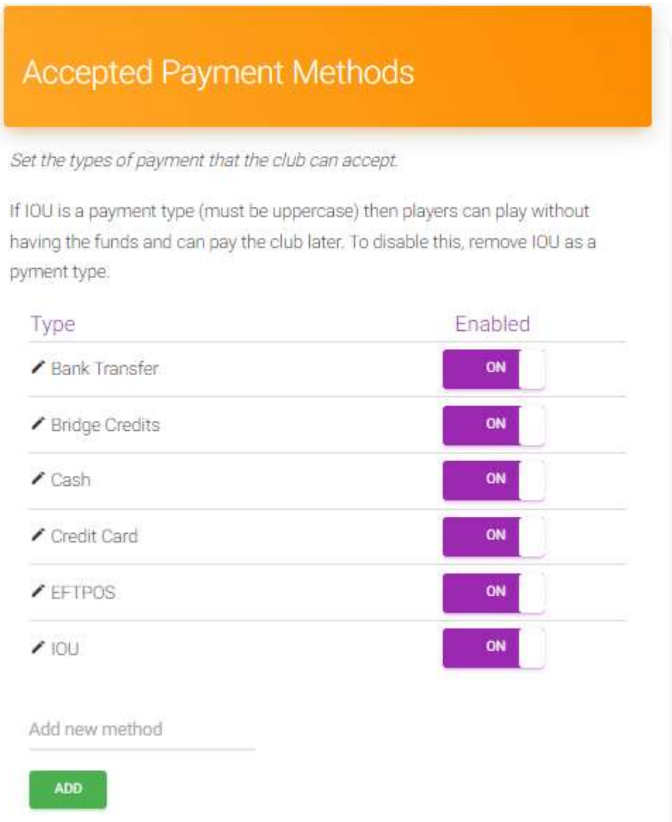
13.3.2. Payments

If using advanced Access control, only users with the right to edit payments information will be able to access this section. It has assorted parts to it governing income and payment methods.

13.3.2.1. Accepted Payment Methods

This is where you define what payment methods your club is willing to accept. These will then be available for the director to allocate to players in the session and they will flow into the financial reconciliation.

Some payment methods are fixed in the system but most can, if you wish, be disabled. It is also possible to add new methods and enable/disable them as well.

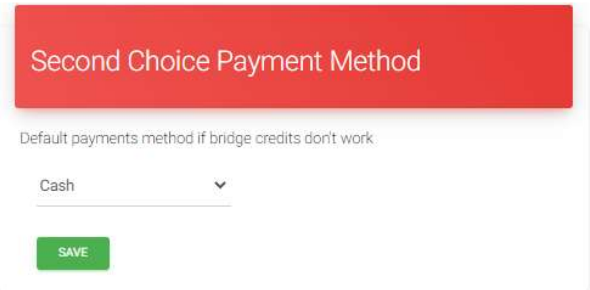


This list is used in two places:

a) it will determine how your session financial reconciliations are split up.
b) It allows you to specify different table money for different payment methods

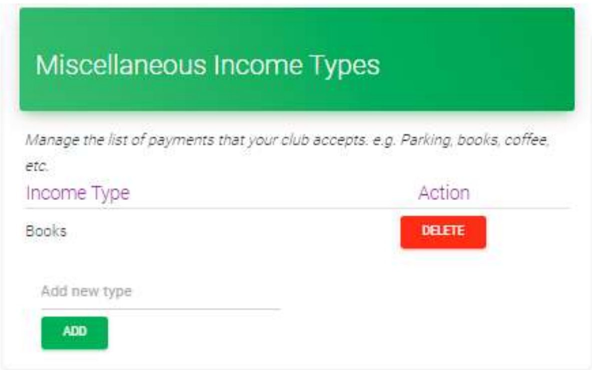
13.3.2.2. Second Choice Payment Method

Here you can select a second choice payment method that will be the default for players where bridge credits are not available (either because the player doesn't have a sufficient balance or because they have not authorised bridge credits to be taken from their account). This setting defaults to cash but can be changed to anything you wish.



13.3.2.3. Miscellaneous Income Types

This area also allows you to set up Miscellaneous Income Types which are additional categories of income besides table money that you want your club to be able to record during sessions.



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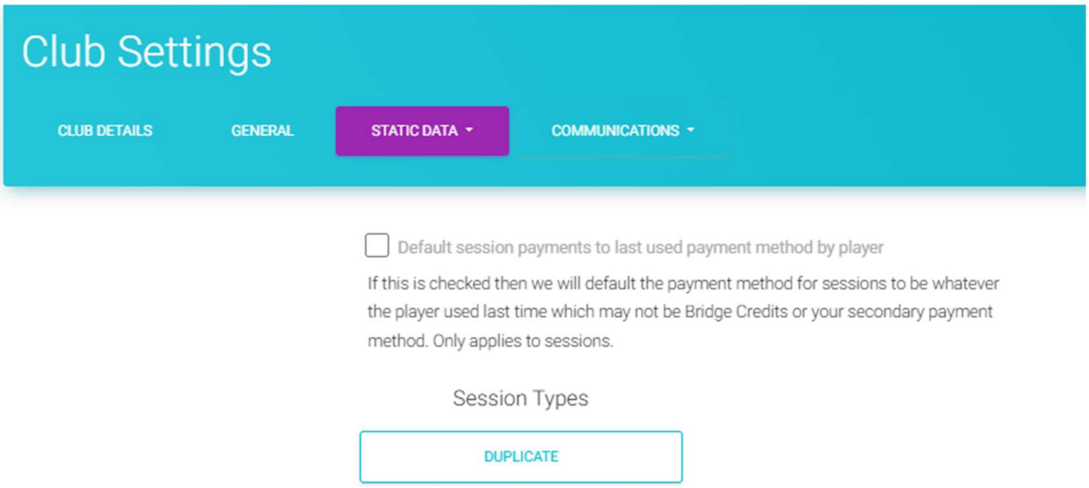
13.3.2.4. Balance after Settlement

This is where the club can specify a "float" that it generally wishes to keep in its bridge credits account (to accommodate player refunds or perhaps the payment of prize money in the form of bridge credits).

This will be shown as a reduction to the available balance for settlement by the ABF.

13.3.3. Sessions



13.3.3.1. Default to last used payment method

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. Obviously you can change that method and the new choice will apply thereafter.

Notes on the behaviour of this default:

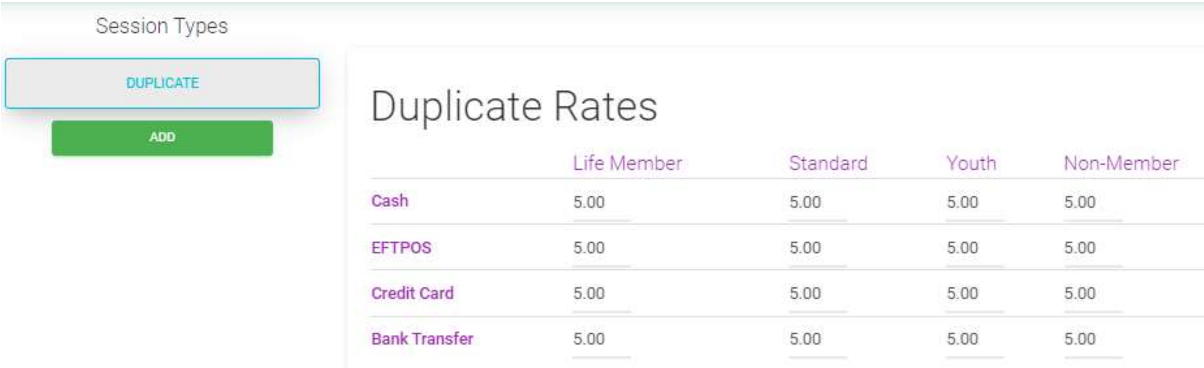
- It applies only to Table fees (Extras are handled separately and can each have different payment methods).
- It only applies for that player within your club.
- It does not apply to "IOU" (see section **Error! Reference source not found.**) – if IOU is used for a player in a session, it will default 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 **Error! Reference source not found.** above).

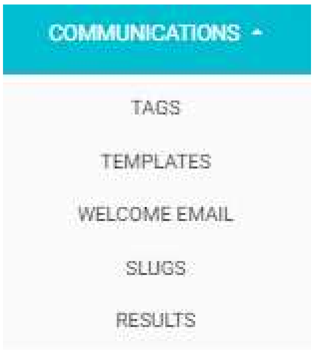
13.3.3.2. Session Types

This is where you can define session types and the table money that applies to each. Duplicate is created as a standard session type. You can set up as many additional session types as you want (common examples could be Supervised, Lessons, etc). For each session type there is a matrix of rates presented. This allows you to specify table money rates for each different type of member (the columns) and for players who use different types of payment method (the rows). In practice a lot of these will be the same but the matrix allows complete flexibility for those clubs who do, for example, offer discounts for different payment methods.



These rates will later be used to calculate the table money for players in the session.

13.4. Communications



This area is where you create and manage underlying settings which are used when sending email communications to your members.

13.4.1. Tags

Emails will, by default, be sent to all your club members. "Tags" enable you to arrange members into different groups so you can send specific communications only to those who are interested.

Tags are used for general communications, you don't need to set up tags for things like results publishing.

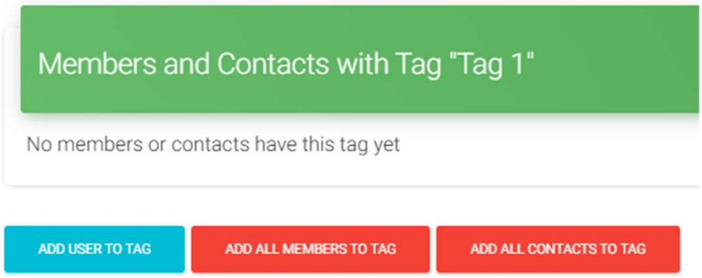
You can create tags and assign them to members and contacts here (or you can also do that from their individual records).

The pen icon to the left of the tag name can be used to edit the name at any stage:

Amend the text and click Rename to save the new name.

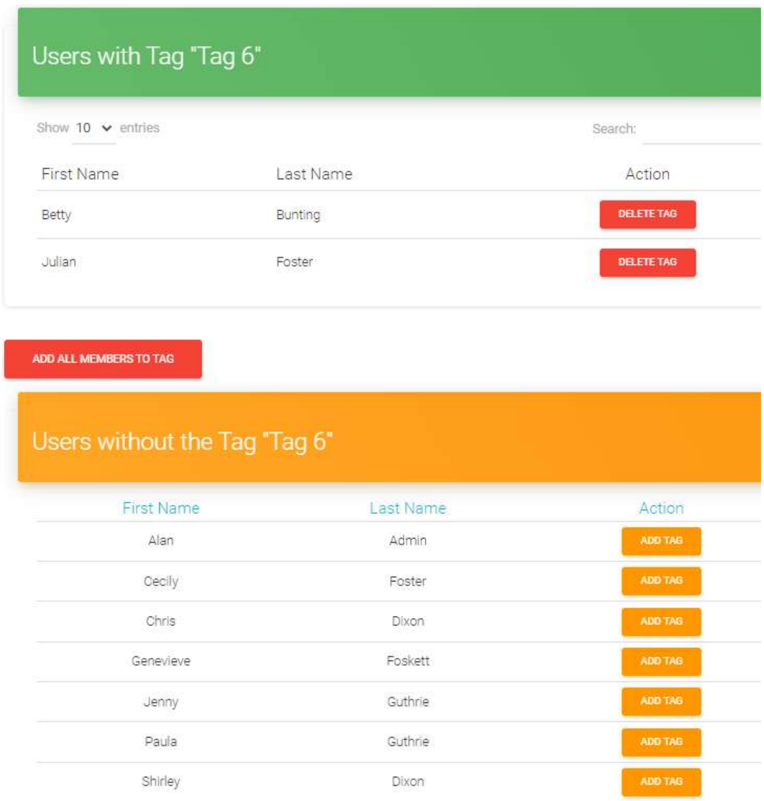
Click on Delete Tag to remove the tag altogether.

Click on Manage to add the tag to members or contacts:



You can individually add users or start by adding all members, or all contacts.

Once you have a list of people with the tag, you are able to add or remove the tag from them:

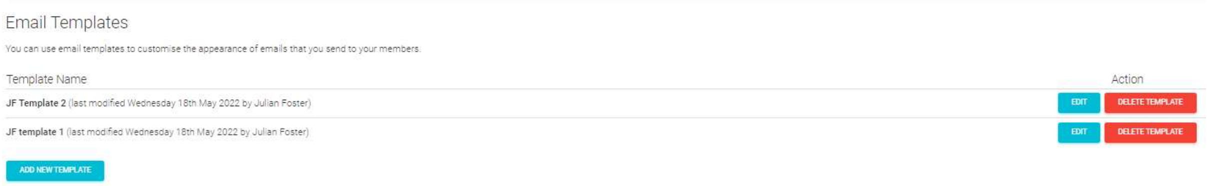


Click on the Delete Tag or Add Tag buttons to move people between the lists.

Tags can also be added for a particular member or contact by editing their record.

13.4.2. Templates

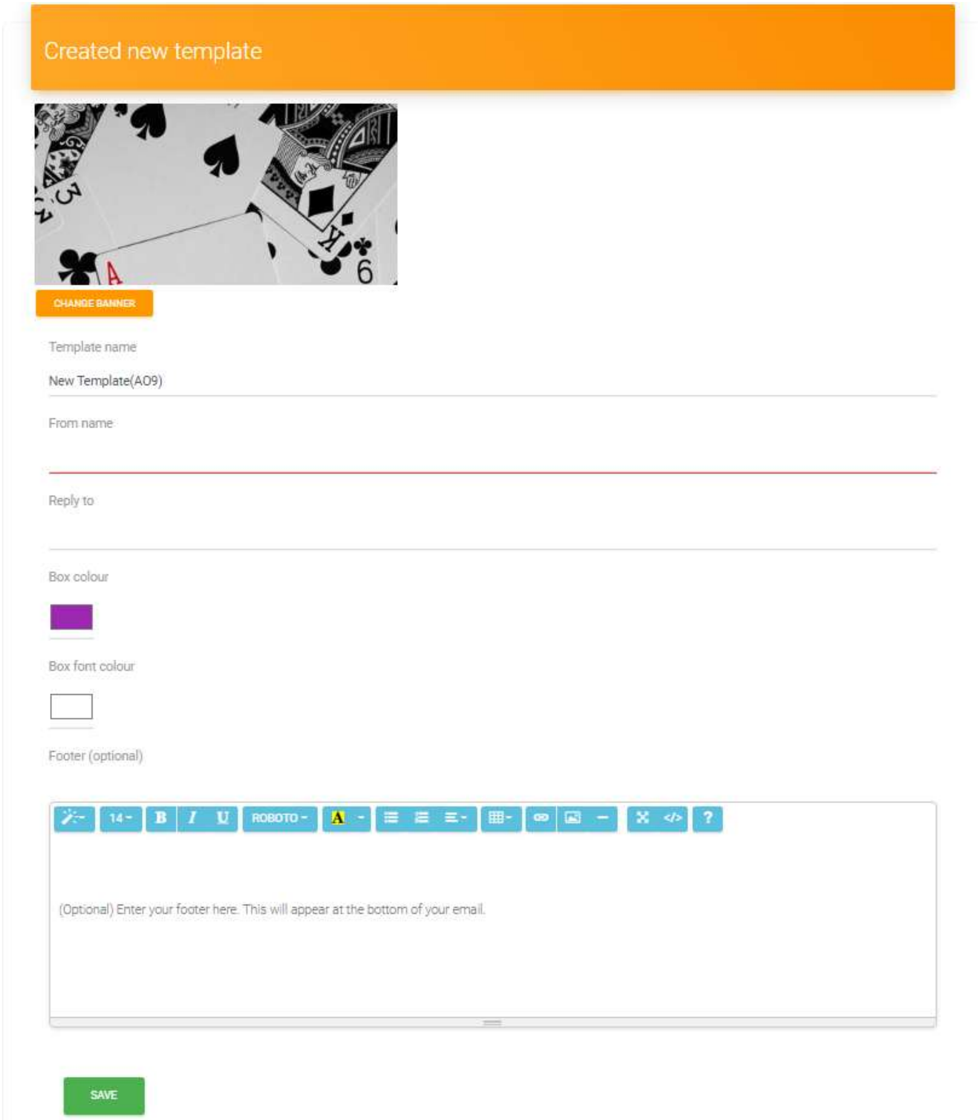
Email templates are used to customise the appearance of emails that you send to your members.



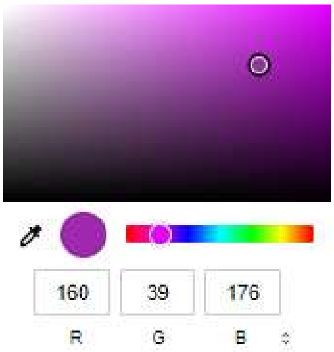
When you add a new template you can input:

- A banner image (which will appear used across the top of the email)
- Name of the template
- From Name (the name the email recipient will see the message coming from)
- (Optional) Reply To email address (where any replies to the emails will go)
- Colours for the text and background of the subject bar (see below for how to use these)
- (Optional) A footer (which can be built in the edit box – it can include images and links as well as text).

Within the screen, edit the various sections and click Save at the bottom to save your changes.



To select colours click on the shaded box to bring up a colour selection tool:



You can select colours in this tool by:

- Using the slider bar to select the primary shade and then dragging the circular icon in the main window to the exact colour you want; or
- Using the R, G, B boxes to derive the colour you want (white is 255,255,255; black is 0,0,0)

An example is provided on the right of the screen to illustrate what an email using this template will look like.

You can edit an existing template and delete templates at any time.

Note if you do not use a template you will have to input some of these details each time you compose a new email. It is therefore strongly advised that clubs set up at least one template to make sending emails easier.

A template named "Results" can be set up and this will be automatically used when sending emails to users with their results. See section 8.5 above for more details.

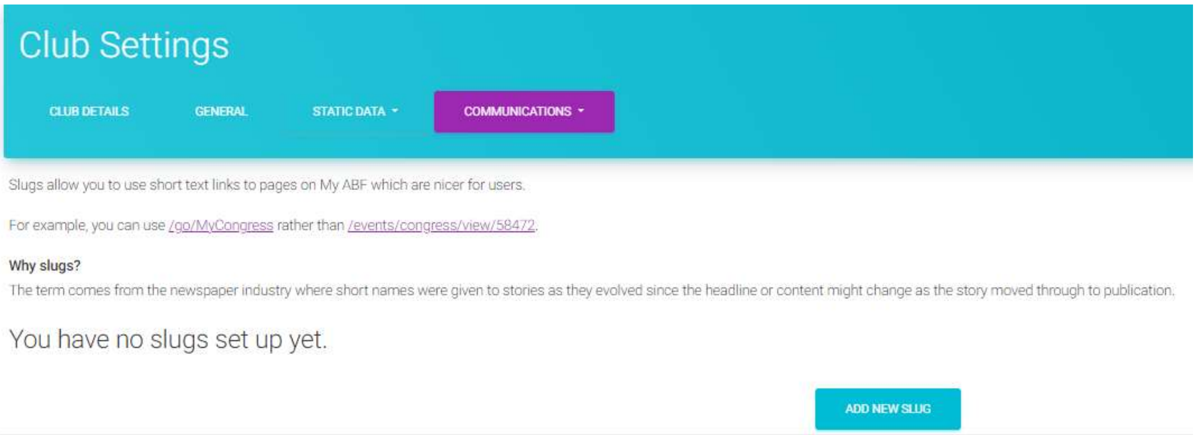
13.4.3. Welcome Email

This is where you can create a Welcome email. Build the content, select the template to be used, and send a test email to yourself. Whenever you add a new member to the club you have the option of sending them this welcome email (provided of course they have a valid email address set up).

13.4.4. Slugs

Slugs allow you to create a short text link that is more understandable for a user when linking to a congress page.

They will most commonly be created by users when setting up a Congress; but they can be both created and managed here.



When adding a new slug, input a short name (which has to be unique). If it's available, the system will prompt you to add the full link and, if the link is also valid, will present the Create button:

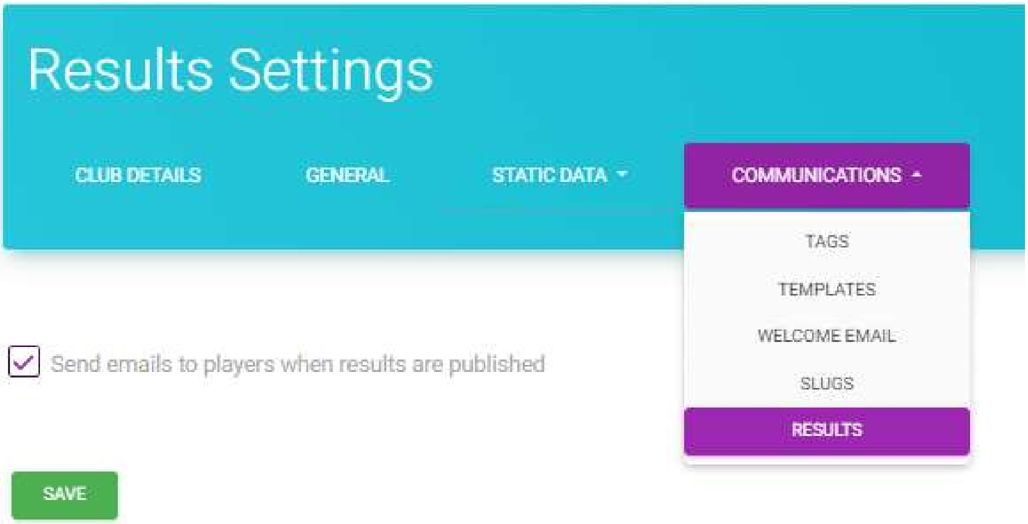
Once created the slug is saved in a master list for your organisation.

You can now use the link https:// myabf.com.au/go/FBCCongress to take a user direct to the My ABF Congress page (instead of needing to put the full URL including an internal congress reference number that means nothing to users).

Slugs can be edited here to be redirected somewhere else (perhaps to reuse for the next year's congress).

13.4.5. Results

This section contains a tickbox allowing you to enable or disable the sending of results emails to players.



A scenario where you might want to disable them is if you are already sending results emails through Pianola. Although you may wish to still publish results so your members can see their results through their My ABF dashboards, you may not want them to receive a 2nd email.

If emails are disabled through here a message will be displayed on the Results screen as a reminder.

13.5. Logs

This shows a log of the major changes made to the club administration areas. At this stage it can be viewed and searched but not exported.