Release 4.0   May 2024

EMAIL CHANGES FOR CLUBS

The latest release of My ABF contains several enhancements to emailing that are available to club administrators. In particular you can now:

- View outgoing congress emails as well as club communication emails
- Email entrants across multiple congresses or multiple years of the same congress
- Modify email recipient lists
- Apply a club template to all outgoing emails relating to your club

This document summarises the changes made.

Contents

1. Overall changes made

1.1. Email types

Emails have been classified into two broad types:

- Entrant emails (relating to congresses – e.g. entrant lists, unpaid entrants, entry notifications, etc); and
- Club emails (relating to the club – e.g. general club communications, results, welcome new members, etc).

The following table describes these:

Type	Sub-type	Description / Examples
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.
Club emails	Admin	• Financial – e.g. club paying or charging a member.
	Comms	• General club email sent to members or a tagged group of members. • Welcome email sent to new members.
	Results	• Results email sent to players in a session where results have been published.

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 players 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)

1.2. Common "Batch" email workflow

A new workflow has been introduced for all "batch" emails (i.e. emails capable of being sent to multiple recipients). This workflow consists of up to 4 steps:

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

Depending on which type of email you are creating you may start at step 1 or step 2.

Some elements of this workflow already existed when drafting club communication emails. These have now been expanded.

1.3. The new Communications screen

Here is a sample of the new Communications screen:
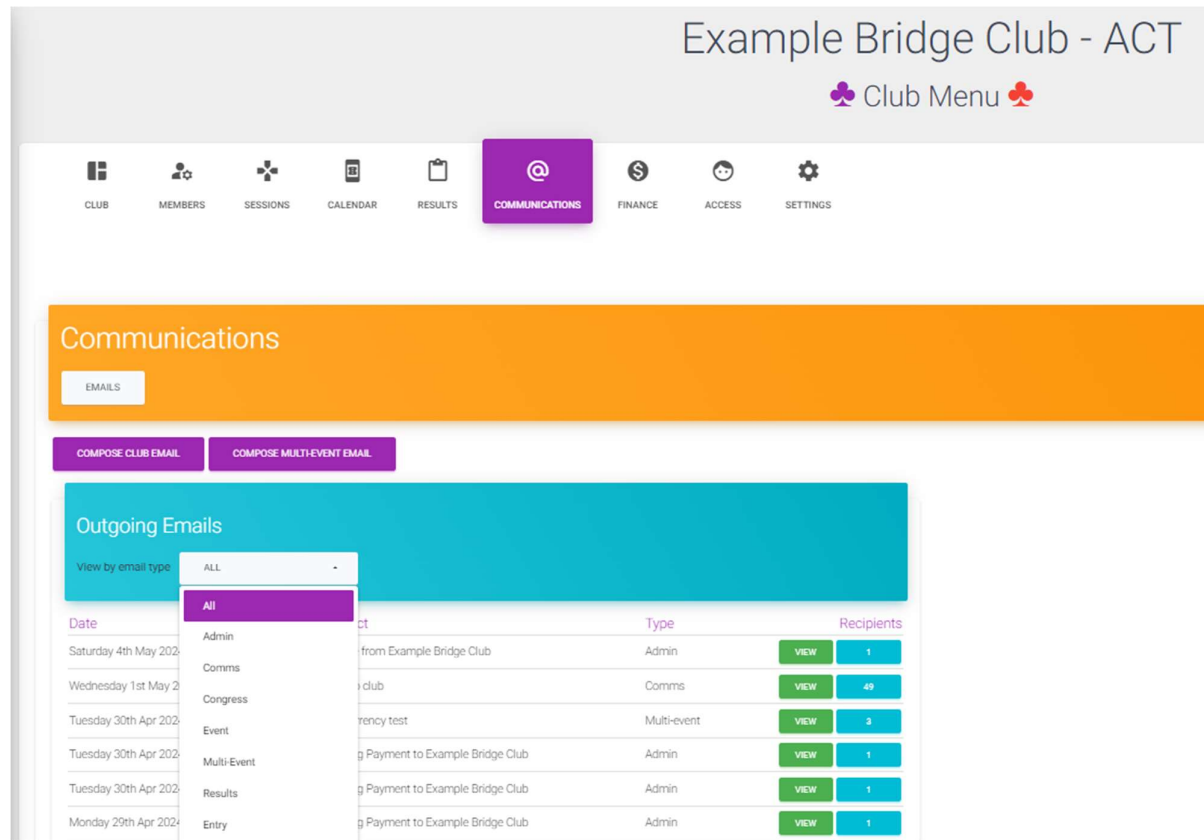
From here it is possible to:

- Compose a club email (i.e. send an email to members or tagged subgroups of members) – this function already existed.
- Compose a multi-event email (i.e. select assorted events or congresses to email that entrant list) – this is new.
- View details for outgoing emails of various types – this functionality already existed for some club emails but not congress related emails.

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

- Those with Congress access can compose Multi-event emails and view Congress related emails only.
- Those with Communications access can compose Club emails and view club related emails only.
- Those with both will see both – i.e. the screen as above.

2. Email entrants across multiple events /congresses

It is now possible to 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:

- The Compose Multi-Event Email button on this screen:
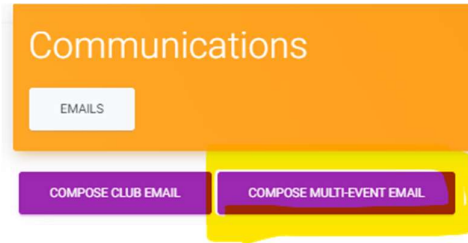
- A new action on the Calendar page of the Club Admin menu:
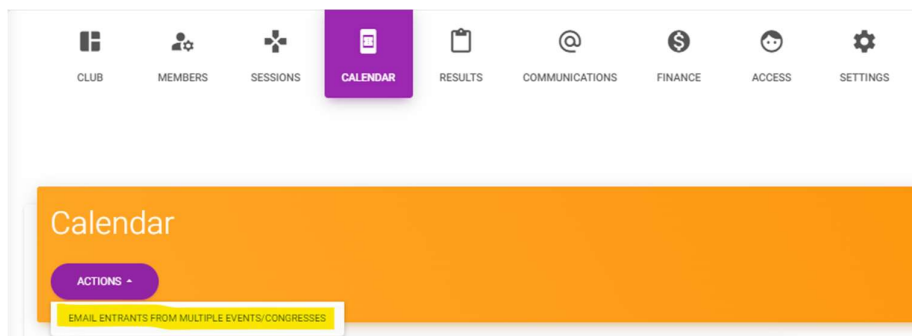
This then brings up a tree structure listing of all the organisation's events and congresses and enables them to be ticked or unticked to include entrants from the ticked events/congresses. Alternatively you can select a date range and all congresses within that range will be selected:
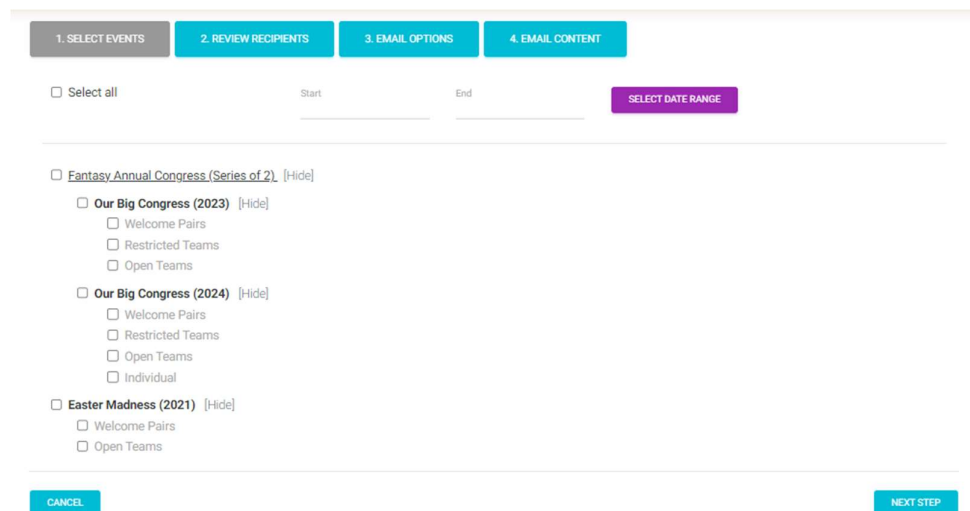
Once this selection has been finalised, you then proceed to the next step of being able to review the recipient list and, if required, amend it.

3. Modify email recipient lists

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

3.1. Club communication emails

For this type of email there are no recipients initially selected. It is possible to add a group of members by tag, add all club members, search your club members 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.

External emails cannot be added at this stage – this is coming later – see 3.3 below.

3.2. Entrant communication emails

This type of email always starts with a selection of recipients already there – either by a choice of events/congresses 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).

As before that list is displayed and is 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 also possible to individually untick people, Select All, Deselect All and remove existing recipients.

External emails cannot be added at this stage – this is coming later – see 3.3 below.

3.3. Future enhancement – add a contact email

At this stage it is not possible to simply add an external name or email address to these mailing lists.

New functionality coming later will facilitate clubs being able to track "Contacts" (i.e. non-members) as well as members; and include those in email lists. Once that has been built, it will be incorporated here so that Contacts can be added to a mailing list (either by selection from existing contacts or by creation of a new one).

4. Apply a club template to all outgoing emails relating to your club

To date it has been possible to create custom templates for your club. However, these have been limited in their operation and only capable of being applied to club related emails but not congress related emails originating from your organisation.

The functionality has now been broadened and some rules established to enable clubs to apply a single common template to all their outgoing emails if they wish.

All the emails described in this document have an underlying template applied to them.

4.1. General templates (without saved text content)

NOTE: 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.

If they wish to do so, however, clubs can create and save multiple templates and apply them to their outgoing emails.

A template governs assorted aspects of an outgoing email – primarily look and feel. Note it is NOT a saved email with text content.

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:
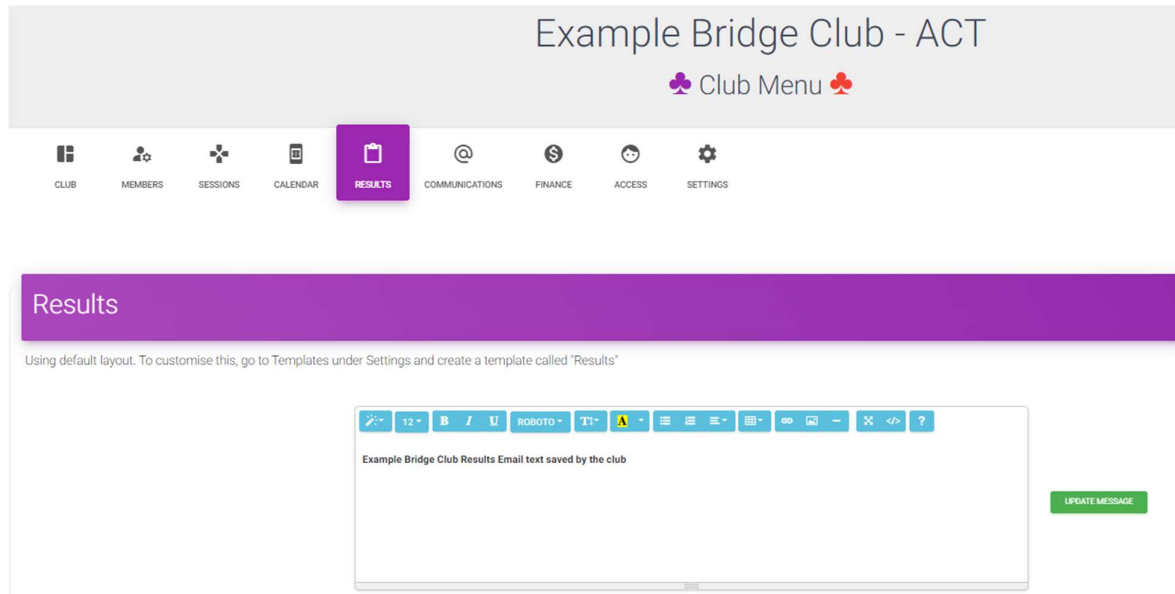
4.2. Where you can save email content

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.
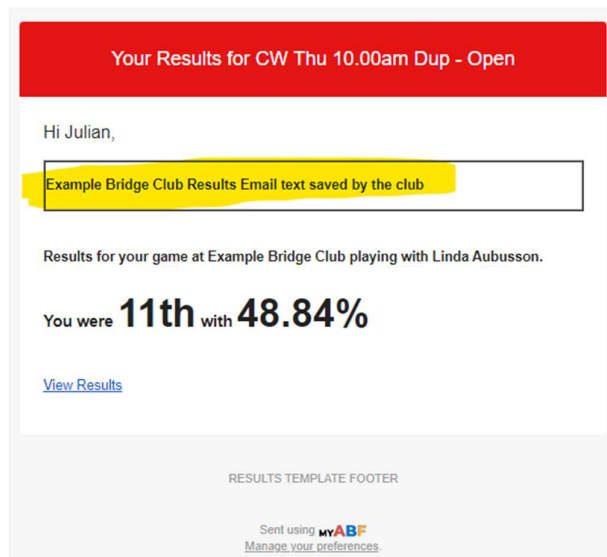
4.2.1. Results email

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:
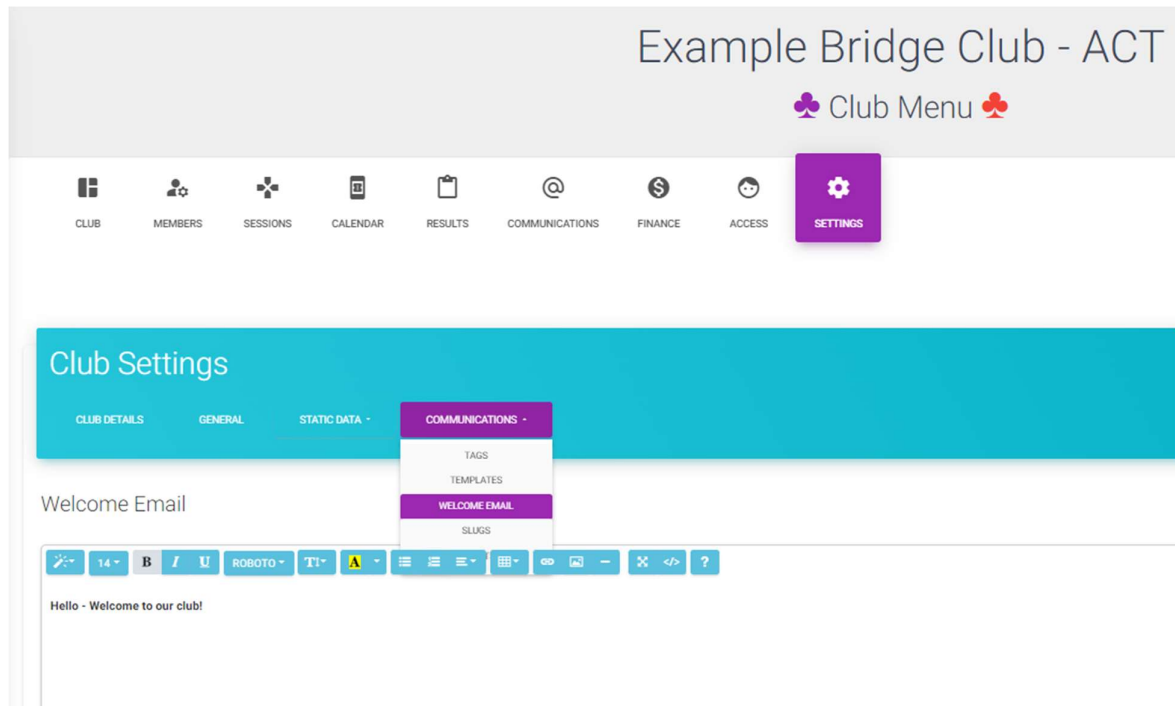

It is also possible to define a separate club template to be used for these if required (see below).
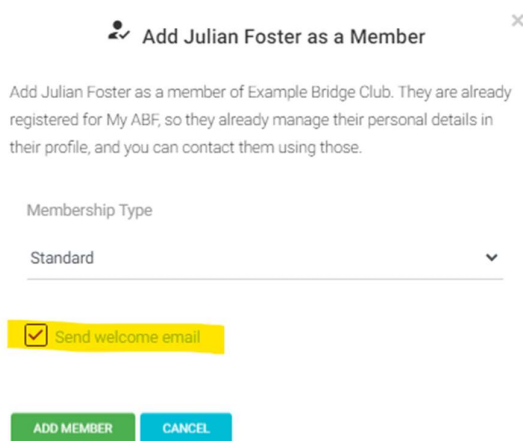
4.2.2. Welcome email

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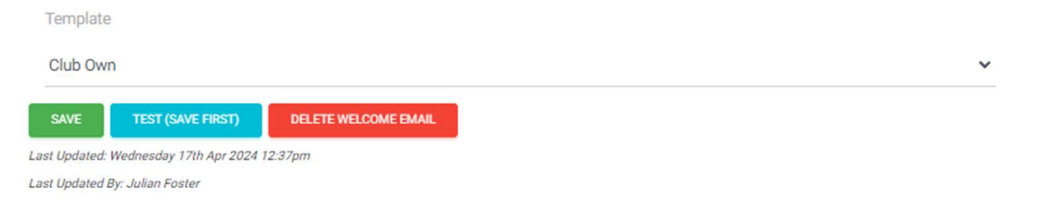
When a new member is added to the club there is an option to have this welcome email sent to them:

4.3. 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. There are also some specially named templates.

4.3.1. 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).

4.3.2. 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.

4.3.3. 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)
- Results
- Welcome