CLUB MEMBERSHIP USER GUIDE

Last updated: Julian Foster 20/11/2024

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Table of Contents

1. Overview

1.1. Introduction – and purpose of the functionality

This area gives you the ability to manage the list of members for your club. There are a number of areas throughout My ABF that require knowledge of your members:

- If you are going to use the Communications section to send emails to members or groups of members.
- If you run club sessions where players can be charged bridge credits. Almost all clubs charge a different amount of table money for members and visitors and some also charge different amounts depending on the type of member. Therefore it is necessary for My ABF to know who your club's members are at any point in time to be able to charge them the right table money.
- If you wish to run a Congress which is limited to members or to charge different entry fees for members and non-members.

1.2. Full v Simple member management

There are two ways you can use this area. You can maintain a simple list of members for one or more of the above uses and that's it – this is "simple member management". Or you can use My ABF as your primary management tool for your members – known as "full member management". Exactly what is available under each mode is shown here:

1.2.1. Simple Member Management

Using Simple Member Management you can:

- Upload members
- Maintain details for those members
- Maintain (manually) dates for memberships (e.g. start date, end date, etc) & status.

This enables you to maintain a list of your current members in the system which can be used:

- To send email communications to members
- To identify the correct entry fee for club events
- To identify the correct table money for club sessions
- [In future] To maintain home club member records for ABF capitation fee purpose (this is currently done through the ABF Masterpoint Centre)

1.2.2. Full Member Management

Under Full Member Management you can also:

- Maintain a historical record of memberships for each player – including different types, statuses, etc.

- Track dates for memberships including when a member is paid to
- Issue membership renewals (individually or in bulk)
- Track incoming payments for membership
- Facilitate collection of membership payments automatically through Bridge Credits

To use Full Member Management there are some core club level settings that need to be created. See 2 below for more details.

1.3. Who gets access to this area

When using basic access control, everyone with administrative rights to your club will be able to access all parts of this area. When using advanced access control rights can be separately given to users to edit member records. This gives those users (and only those users) the ability to:
- Add members
- Edit member records
- Download a csv report of members' details

1.4. Registered and Unregistered users

Obviously not everyone with an ABF number has signed up to My ABF. That means when your club creates its list of members, some will already have My ABF accounts (we call these "Registered users") and some will not (we call these "Unregistered users"). They are handled slightly differently in My ABF and you will be able to invite your members who are unregistered to join.

Users (both registered and unregistered) can of course be members of more than one club.

There are 3 possible scenarios that can occur when you add a member:

1	They are already a registered My ABF user	You can add this user as a member of your club.
2	They are already an unregistered My ABF user	They have not signed up for My ABF but another club has already added them as a member. You are now adding them as a member of your club as well.
3	They are not currently a My ABF user at all	They have not signed up for My ABF and no other club has added them as a member. This means you will be the first club to add this member to the system.

The primary difference between Registered and Unregistered Users is in how you manage email communications with them. Registered users already have a personal profile within My ABF and they can choose to share some data from that to their club record. For Unregistered users clubs need to maintain email addresses for those users.

2. Overall club membership settings

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

2.1. Annual membership renewal date

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

This will most commonly be 1/1 (1 January) or 1/4 (1 April).

2.2. Type of member management

Under Settings – General you can also tick whether you want to enable full member management or not.

2.2.1. Simple Member Management

Using Simple Member Management you can:

- Upload members
- Maintain details for those members
- Maintain (manually) dates for memberships (e.g. start date, end date, etc) & status.

This enables you to maintain a list of your current members in the system which can be used:

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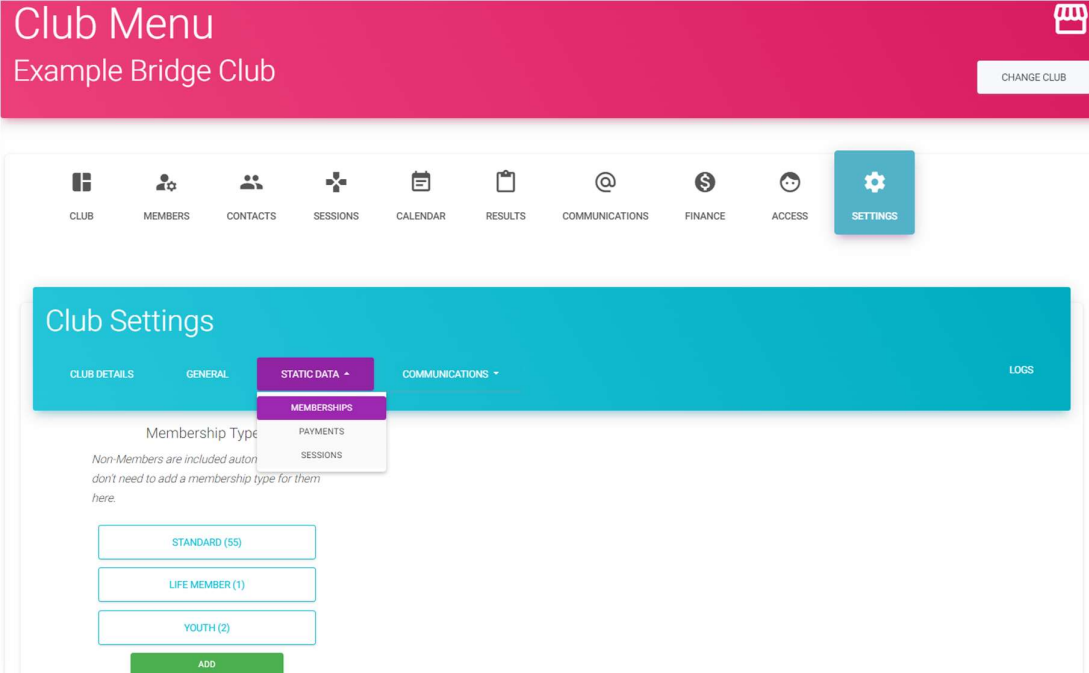
2.2.2. Full Member Management

Under Full Member Management you can also:

- Maintain a historical record of memberships for each player – including different types, statuses, etc.
- Track dates for memberships including when a member is paid to
- Issue membership renewals (individually or in bulk)
- Track incoming payments for membership
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2.3. Membership types

Clubs can set up multiple different membership types. My ABF starts with 3 default ones (Standard, Life Member and Youth). But you can edit these and/or set up any others ones you want. The most common are life members, standard members and perhaps concession members.

This is done through Club Settings – Static Data – Memberships

Note Home and "Away"/"Associate"/"Affiliate"/"Alternate" members are NOT necessarily membership types. Those are concepts used by the ABF masterpoint centre to track what capitation fees are due. Many clubs have chosen to set these up as types but there will, in future, be a separate designation for home club status in My ABF (it's deliberately hidden at present so as not to create inconsistency with the Masterpoint Centre home club records).

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

At the end of this period, players who have not renewed will have their membership lapse.

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

3. Adding member data

3.1. Overview

One key thing to understand is that My ABF is NOT the same as the Masterpoint Centre when it comes to recording your members. In My ABF you want ALL your club members in your member listing (so you can communicate with them, reference them to identify the correct entry fee or table money, and manage their membership). That means home club and non-home club members. My ABF does not (yet) care whether they are home club members or non-home club members.

Although members can be added manually it is far more efficient to import a list to get set up initially. You can import member data from 4 possible sources:

- The ABF Masterpoint Centre (but that only brings in home club members)
- Pianola (using a csv file exported from Pianola)
- Compscore (using a csv file exported from Compscore)
- A spreadsheet (using a csv file prepared yourself with specified headings that My ABF reads)

The data fields that exist in these systems do of course vary so that has an impact on what it is possible to bring into My ABF. See sections below covering the various ways of adding members from each source and what data field maps to what field in My ABF.
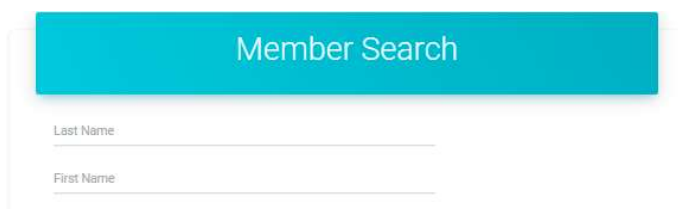
For many clubs it will be simplest to import members from the ABF Masterpoint Centre (noting that these will be home club members only) and then add any non-home club members.

Clubs who maintain their membership list in another product (Pianola, Compscore, etc) will probably find it easier to import from that.

Clubs who charge different table money for different types of members will need to set up the member types and import those groups separately.

3.2. Add members manually

Click Add Member. Here you can search for a player by name in the ABF Masterpoint Centre and add them as a member of your club.

This is most likely to be used when you already have a list of members and you are just making minor amendments to it. Unless the club is very small, this is not an efficient way to add all your members - it is far more efficient to import them.

3.3. Import from the Masterpoint Centre

My ABF can read the ABF masterpoint centre ("MPC") records and import from there.

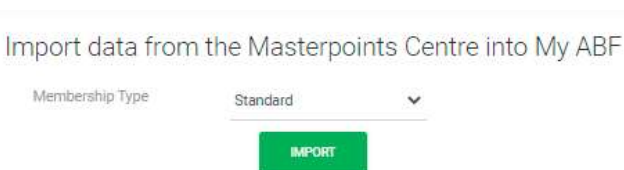It is likely to be a quick and practical option for many clubs but there are a few important considerations:

1. **It will only import your HOME CLUB members as that is all the MPC records**. You will then want to add your non-home club members (referred to as "Away", "Associate", "Affiliate" or "Alternate" around the country!) another way – either manually or via a different import.

2. It will only import limited data fields to your member records – based on what is currently in the MPC (and many clubs do not complete more than the bare minimum requirements).

   If you are wanting to use My ABF for full member management you are likely to want to bring in a great deal more information for your members than is currently stored in the MPC – and should probably consider one of the other import options described below.

3. The MPC has no concept of different membership types. So you have to just select one type and import to that – then change those that are something else. If you have multiple membership types you may be better off importing your members another way.

To import from the MPC:

Click MPC Import.

Select the membership type you want the imported records to have (you will have to change this manually for any that should be different – e.g. perhaps concession instead of standard members).

Click Import and the home club members will be imported. For a larger club with hundreds of members this can take a little bit of time so please be patient!

3.4. Import from csv (general, Pianola or Compscore)

You can import member data from 3 other possible sources:

- Pianola (using a csv file exported from Pianola)
- Compscore (using a csv file exported from Compscore)
- A spreadsheet (using a csv file prepared yourself with specified headings that My ABF reads)

The data fields that exist in these systems do of course vary so that has an impact on what it is possible to bring into My ABF. See sections below covering how imports operate in general and then each import source, including what data field maps to what field in My ABF.

When importing from a csv file the basic selection screen looks like this:

File Type	Generic CSV ⌄
Membership Type	Standard ⌄
Overwrite existing values	☐

Choose file | No file chosen

- Change the File Type setting to select from Compscore (see 3.8), Pianola (see 3.9), or Generic csv (see 3.9).
- Select the Membership Type (see 3.5 below for more information)
- Tick the overwrite existing values box if required (see **Error! Reference source not found.** below for more information)
- Browse to find the source file. Once you have chosen a file a green Upload button will appear:

Choose File | Generic csv -...members.csv

UPLOAD

Click Upload to import the data. Once again for a larger club with hundreds of members this can take a little bit of time so please be patient!

You will receive an error report where the file contains:

- Invalid ABF numbers
- Duplicate records

Members with inactive ABF numbers will be imported but clearly those members should be reminded that they are not currently recorded by the ABF Masterpoint Centre as having a Home club and this should be rectified.

3.5. Importing different membership types

When importing from a generic spreadsheet, you can have a column specifying the membership type for each member. Provided those types are already set up in My ABF, the import will set that type for the member automatically.

When importing from other sources, this does NOT happen.

- The MPC does not have any concept of a member type so you have to just select one type and import all records to that – then change those that are something else.
- For Pianola or Compscore, you are advised to sort the source csv file and break it up into a separate file for each member type. This is usually a one-off activity the first time you import members.

3.6. Behaviour of imports and the overwrite existing values option

The following things ALWAYS happen when you import a file:

- New member records will be added
- For existing member records:
  - Blank fields in My ABF will have data from the source file added to them
  - Data already in My ABF will not be removed if the field in the source file is blank – if you do wish to specifically delete a field you need to do it manually in the member's record

The tickbox "Overwrite existing values" influences what happens when there is data in a field for a member both in the source file and already in My ABF:

- If that box is UNTICKED then existing data will NOT be replaced.
- If that box is TICKED then existing data WILL be replaced.

In both cases new records will still be added and blank fields will still be updated.

3.7. Importing dates for members

3.7.1. Pianola

Pianola has a data field for when the member joined the club. When importing, therefore, My ABF makes reference to that.

Because My ABF records memberships annually, it will create a current membership upon import. The start date of that membership will be set to either the start of the current membership year (where the joining date is on or before that date) or the joining date (where later – i.e. if the member has joined during the current year).

3.7.2. MPC or Compscore

These systems do not have a joining date. Therefore, when importing from here, the joining date is set to the current day. So the initial period of membership will show as running from the current day to the end of the club's next membership year. The Start date can be overwritten later if required.

3.7.3. A generic csv file

When importing from a generic csv file it is possible to import both a Joining date and a Start & End date for the membership period. This feature can therefore used to update the Start or End date of a period originally created from an import from the MPC or Compscore.

Note there are some constraints about dates – see 6.2 for a better understanding of the different dates that exist in member records.

3.8. Importing from Compscore

The following table shows what data field from Compscore's export file will import to My ABF and where:

Compscore field	My ABF
Surname	Last name
Given Names	First name
Address 1	Address 1
Address 2	Address 2
	State (doesn't exist in Compscore but derived from postcode when importing to My ABF)
Postcode	Postcode
Phone	Preferred phone
Phone Other	Other phone
EmailAddress	Email
ABF No	ABF number
Financial Till	
Emergency Contact	Emergency contact details
Comments	Notes
Date of Birth	Date of birth
Membership Type	
Club Number	Club membership number
DeceasedOrResigned	
Last Paid Date	
Last Paid Method	

3.9. Importing from Pianola

The following table shows what data field from Pianola will import to My ABF and where:

Pianola Field	My ABF
Local number	Club membership number
National number	ABF number
ABF rank	
Title	
Initials	
First name	First name
Last name	Last name
Email	Email
Phone number	Preferred phone / Other phone (Note 1)
Mobile number	Preferred phone / Other phone (Note 1)
Address line 1	Address 1
Address line 2	Address 1
Address line 3	Address 2
Address city	Address 2
State	State
Postal code	Postcode
BBO username	
BCL username	
Custom field	
Gender	
DOB	Date of Birth
Member category	Membership Type
Joined date	Joined date (Note 2)
Share phone?	
Share email?	
Share address?	
Left club date	Left date
Left club reason	
Paid till	
Private Notes	Notes
ICE	Emergency contact details

Note 1. By default Mobile number will go to Preferred Phone and Phone number will go to Other phone. But if Pianola has one of them marked as "Preferred" (which is designated with "(P)" after the number in the export file) that will take precedence on import.

Note 2. When importing members from Pianola, the joining date is included in the member's overall record. Because My ABF records separate memberships each year (as opposed to 1 potentially long-running one) the joining date influences the initial membership period created:

- Joining date prior to start of current year.   Initial period = the full current 12 months.
- Joining date during the current year. Initial period = then to the end of the current year.

3.10. Importing from a generic spreadsheet

Here you can identify a csv file containing information about your members and import from that into My ABF to create the users.

Use this page to import your member list into My ABF
This can take a little while to process, please be patient.

File Type: Generic CSV
Membership Type: Standard
Overwrite existing values: ☐
Choose file | No file chosen

Generic CSV

You can upload any data in our generic CSV format. The file needs to have comma-separated values (CSV) with the following required columns:

ABF Number, First Name, Last Name, Email, Membership Type

The email address is optional.

The Membership type is also optional. If specified, it will override the Membership Type chosen on the form. Membership Type must match exactly with the name of a valid Membership Type as defined in Settings.

Optional columns can also be included:

Address 1, Address 2, State, Postcode, Preferred Phone, Other Phone, Date of Birth, Club Membership Number, Joined Date, Left Date, Emergency Contact, Notes, Membership Start Date, Membership End Date

Note: If an optional column is included, all prior optional columns must also be included

A header row is expected, you will lose the first row of data if you do not have one.

There are instructions on this page describing the columns available.   There is also a blank Excel template available which contains all the columns already set up. This can be found on the My ABF Resources page on the ABF website: https://www.abf.com.au/member-services/my-abf-resources/clubs/

Once set up the file should be saved as a csv file and can then be used to import from.

Note the use of the General csv template in conjunction with the Override existing values tickbox provides a powerful way to update multiple membership records.

3.11. How does this connect to the Masterpoint Centre member records?

It doesn't. Although My ABF can access the Masterpoint Centre database and import data from it, it remains separate and the two systems will run in parallel for quite a while. The masterpoint centre records will remain the "source of truth" for the purpose of identifying each club's home club members (which is what is used to calculate ABF capitation fees).

At this stage there is no reference to "Home club" membership in My ABF because all My ABF is seeking to obtain is a list of your club's actual members. It doesn't yet care about whether someone is a Home Club member or not.

In future this will be another parameter included in My ABF and it will then be used to calculate capitation fees as well. But until then clubs will still need to process their annual cancellations of home club members in the masterpoint system as usual.

In 2025 it is planned that the Masterpoint Centre functions will be rolled into My ABF.

4. The list of members

After you have added some members to your club they will appear in the default "List" view:

The list shows name, ABF number, Membership type, Status, User type (My ABF user or Unregistered user) and bridge credits balance (where relevant). It also allows you to view the profile of an existing My ABF user or invite an Unregistered user to join.

This list can be sorted by clicking on any of the column headings. An up or down arrow symbol is shown by the column where the sort is currently applied. The selected sort order is retained when you leave the page and later return.

In the header bar are options to add new members and a search function:
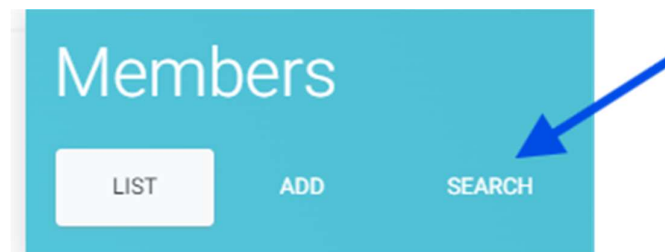
If you have member editing rights, you will be able to click on the member name and edit the records – as described in section 7 below.

4.1. Inviting Unregistered members to join My ABF

Clubs are encouraged to invite all their members to join My ABF. Having a registered My ABF account enables them to participate in bridge much more easily, including entering and paying for both events and club sessions. It also gives them control over managing their personal information like email addresses (clubs have to maintain that for unregistered members).

There are two ways to invite unregistered members to join My ABF – as part of a bulk invite, or individually.

4.1.1. Individual invite

As shown above, from the main list of members you can individually send an invite to an unregistered user.

It is also possible to do this from the member records under Invitations. See 7.3.3 below.

4.1.2. Bulk invite

It is possible to send an invite to all unregistered members inviting them to join My ABF. This is done from the Add member screen.
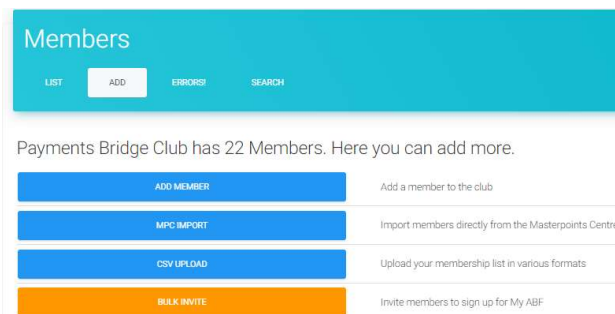
Once you have used this function for a player you cannot invite them again via a bulk invite for two weeks. The system presents a list of all the unregistered members that can receive the bulk invite and those who can't (you can still invite them individually).
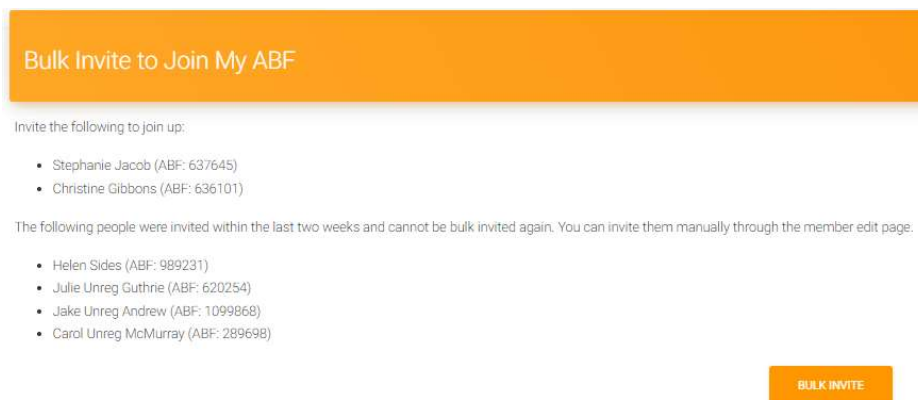
The bulk invite button will then send the email to all those unregistered users (provided they have valid email addresses recorded in their member record).

4.2. The email invite for an Unregistered user

The email sent to unregistered members looks like this:
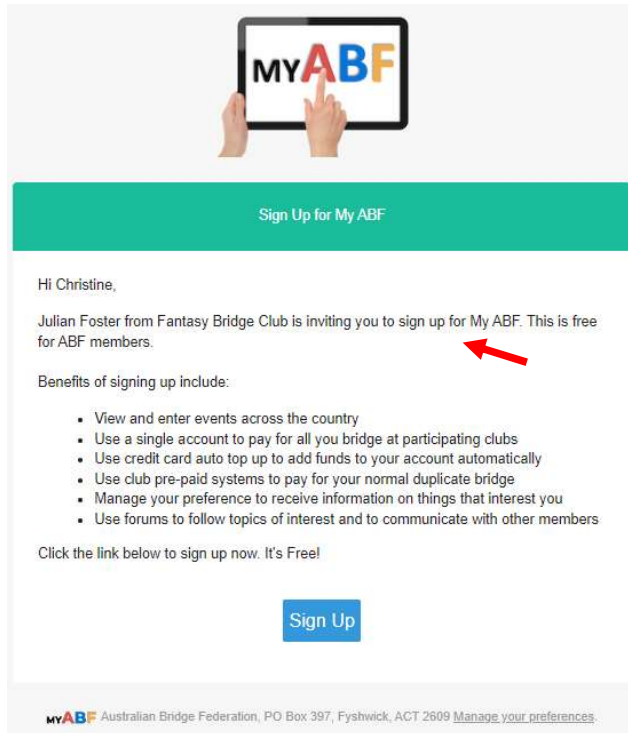
When the user clicks the Sign Up button they will be presented with the Sign-Up screen pre-filled with their name, ABF number and email address. All they have to do is create a password and confirm it (although they can edit the email address if they want to register with a different one):

4.3. Members' contact email address

An important aspect to maintaining member records is their contact information. The way this is handled in My ABF can vary depending on whether the user is registered or not:

1	Registered My ABF user	These users already maintain their own personal details which includes an email address in their My ABF profile. They have the option of sharing that email to their club record as well. You communicate with them using that email address.
2	Unregistered My ABF user	These users do not have their own My ABF profile. When they are first created in My ABF an email address can be set up for them by the club adding them. This is only visible to that club. 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.

5. How a user can control their club memberships

In a user's profile page is a table of your former and current club memberships (for many users of course this will only be one club).

The table shows your membership status with the club and there are then 3 other choices you can make.

5.1. Block membership

When a club adds you as a member, you receive an email notification. It is also displayed in this table. If you believe this to be an error, or you do not wish to be added as a member of that club, you can click Block.   This will remove you from any existing membership with that club and prevent the club from adding you as a member – unless you click Allow here to remove the block.

5.2. Share Profile Data

A My ABF user already has a profile page with personal data in. This setting allows you to share some of that data (email, phone, date of birth) to your club – to avoid it having to be saved separately or becoming inconsistent.   There are 3 options:

- Always – i.e. whenever you update your My ABF profile, your club membership record is updated
- Once – i.e. when you first make this selection the data is copied, but subsequent changes do not flow through.
- Never – i.e. keep the information in your personal My ABF profile and your club membership record completely separate

5.3. Auto pay fees

This tickbox indicates that you are happy for the club to collect payment for your membership from through your My ABF bridge credits account.

6. Membership details

6.1. Overview

Member information consists of two parts:

- Information about the membership
- Information about the member

My ABF maintains a membership record for a player – and this includes a new record each time the membership type changes or renews. This means a historical record of the membership will build up over time.

When you open the membership record for a player you see the Current membership record – older ones are hidden from this view (but can be opened using the Show Detail button – see 2.1.2 below).

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

6.2. Dates for a particular membership record

Each membership record can contain the following dates:

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

6.3. Membership status

A membership can have several statuses. These change over time and as a result of actions by players or clubs.

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

There are several ways the status can change:

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

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

Use this to record a player's membership being terminated, a resignation, or to mark them as deceased.   You can also mark a player as lapsed but that will usually happen automatically just based on time – see 6.3.3 below.

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

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

6.3.3. Changed automatically based on the date

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

Scenario	Change made
A membership has reached its end date and no renewal has been issued.	Becomes lapsed.
A renewal for next year has been issued with a due date before the end of the current period (e.g. renew for 2025 calendar year – due for payment by 1/12/2024).	At the end of the current period. If the renewal has been paid then it becomes the current membership and the existing one is marked "ended". If the renewal has not been paid then it is deleted and the existing membership becomes lapsed.
A renewal for next year has been issued with a due date after the end of the current period (e.g. renew for 2025 calendar year – due for	At the end of the current period. If the renewal has been paid then it becomes the current membership (it will have been

payment by 31/1/2025). The club effectively gives a "grace period" for payment before member rights are lost.	marked as "future" prior to this) and the existing one is marked "ended". If the renewal has not been paid the existing membership is marked "ended" and the renewal is marked "due".
	At the due date
	If the renewal has already been paid then no action is required. If the renewal has not been paid then it is marked lapsed and its end date brought forward to the due date (effectively closing it at that point).

6.4. After a renewal has been created

If a membership renewal has been created (see XXXX below) this will show above the current membership. In that case there are some limitations on what you can do to the current membership.

6.5. Directly editing membership records

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

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

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

7. Member details

There are numerous new data fields about members which can be included in their member records. Many of these can be imported from other systems or via spreadsheet (see section 3 above for details of how to do that).

7.1. Registered users

Users who have their own My ABF account already have a profile page with some personal data in.

The name and ABF number for the member record is passed down from their profile and cannot be edited by the club.

Other data fields (email, preferred phone and date of birth) can be copied by the user to their club member record. The user controls whether they are willing to copy this data or not (it's their personal profile so it belongs to them not the club) so they make this selection in their own profile page – see section 5 above for details.

When that has been done the club sees green icons indicating the data has been shared.

The club can still edit this record to change it but if the player updates their profile, they have the option to update their club member records as they do that.

7.2. Unregistered users

Users who do not have their own My ABF account are added by one or more clubs into the system as members.

For those members the ABF number is locked but all other fields, including the name, are editable by the club.

Member Details		
Last name	Someone	
First name	Not registered	
Email	-	
Preferred phone	-	Other phone -
Address 1	-	
Address 2	-	
State	-	Postcode -
Date of birth	-	Club membership number -
Joined date	-	Left date -
Emergency contact	-	
Notes	-	

EDIT DETAILS

The name fields here are linked to the ABF number so any change to them will show for any club who has this person as a member.

All other data fields are unique to this club's record.

7.3. Recent Activity

It is possible to view recent activity for the member across a number of areas (all this information is limited to interactions that member has with your club):
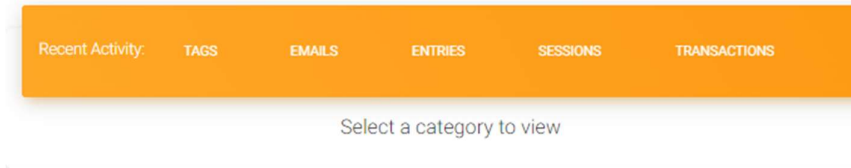
The areas that appear here will vary for Registered and Unregistered users.

7.3.1. Tags

It is possible to add tags to the member's record (i.e. identify them to be included in a mailing list for a particular type of communication you might wish to send). Tags are created in the Settings area. See the Communications section of the Club Admin manual for more information.
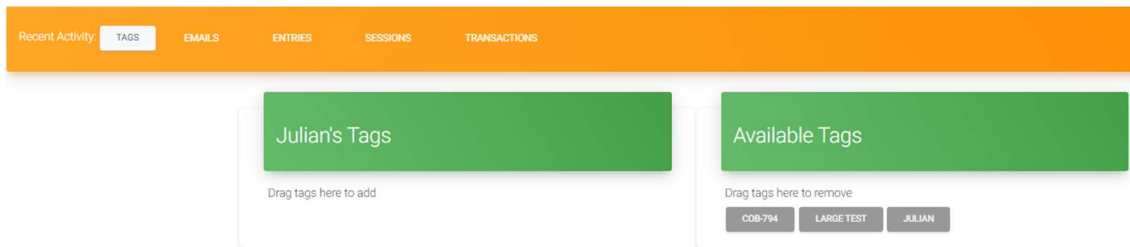
All available tags are shown on the right can be dragged & dropped in and out for this member.

Click a Tag and start to drag it – the screen will indicate where you should drop it:
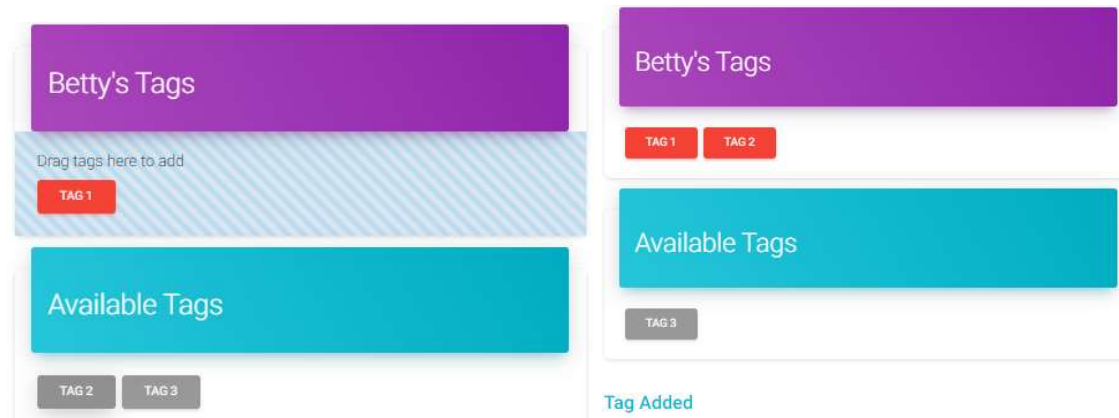
7.3.2. Emails

Any recent emails sent to that user's email address will be displayed and can be viewed.

7.3.3. Invitations

These are only relevant for Unregistered users and show details of how their membership record was added, any invites that have been sent to them, and the ability to trigger another manual invite.

7.3.4. Entries

Upcoming and past event entries for the user can be viewed (and opened if the user happens to be within the entry themselves).

7.3.5. Sessions

Past club sessions the member has played in can be viewed – and the details opened.

7.3.6. Transactions

This is only relevant for members who are Registered users. A Registered member has a Bridge Credits account and it is possible for administrators with the requisite access to view and transact with that account.

It is possible to either charge or pay into a member's bridge credits account. Enter a description and an amount to activate the Charge or Pay buttons. The other side of the entry goes through the club's bridge credits account.

7.3.7. Charge a member's account

This would most commonly be a sundry adjustment (corrections to session charges could be done here but are better processed within the session itself). Such a charge is only possible if the member has a sufficient bridge credits balance.

7.3.8. Pay a member's account

This could also be a sundry adjustment after a session charge or it could also be a top up of the player's account (perhaps if the player paid money to the club). Such a payment is only possible if the club has a sufficient bridge credits balance.
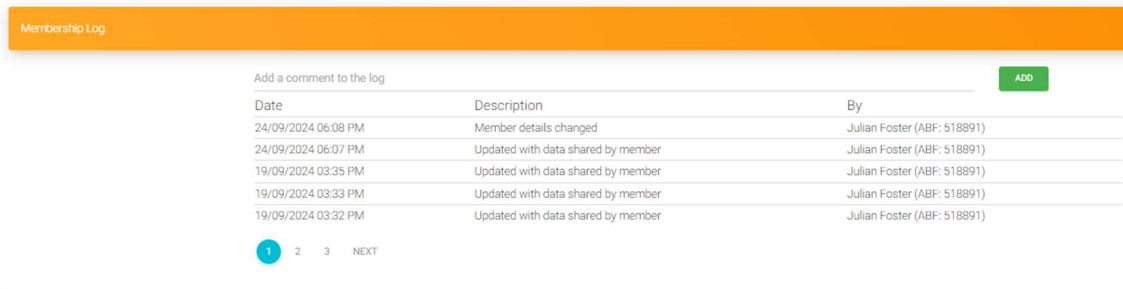
To access these transactions the user needs to have the following access rights for the club:

- Ability to edit member records; and
- Either: Director access or Payments edit access

Email notifications are sent to the member when these transactions occur.

7.4. Membership Log

A log is kept for the member.
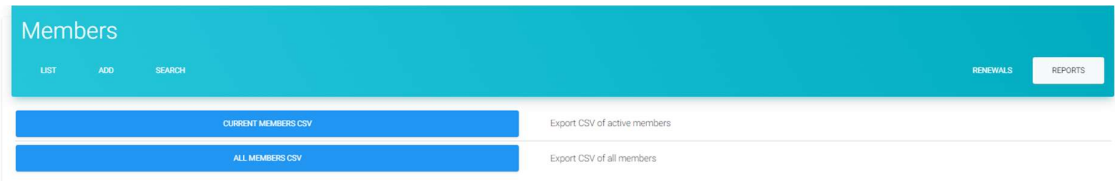
Most of the entries in the log are generated automatically – such as membership updates, status changes, payments, etc.

It is, however, also possible to manually add a note to the log using the Add button above:

8. Exporting member information

Provided the user has access to edit member information, it is possible to export member details from My ABF to a csv file.

This is done from the Reports option at the far right of the Members page:

There are two options:

- Export details for current members.
- Export details for all members – i.e. including former members.

9. Renewals

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

9.1.1. Individual member renewal

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

9.1.2. Bulk renewal

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

This brings up a selection option where you choose which membership type(s) you want to include in the renewal. You can also amend the fee, due date and auto pay dates here.

Next you can prepare the email wording, and club template (if any) to be used.

Next step is to proceed to the members. This will present a list to be included in the renewal.

The Allow Auto Pay column will show an orange cross for Unregistered users (who do not have a bridge credits account); for Registered users it will show "Blocked" if the user has declined permission for the club to collect the membership fee via Bridge Credits; otherwise it will show the date that collection will be attempted.

The Actions column allows the email to a member to be previewed. It also indicates if a member has no email address set up in My ABF.

10. Managing membership renewals

The normal process will be to send out an annual renewal. After that you will be able to see reports about which members are still unpaid.

10.1. Manage outstanding memberships

Click Unpaid Fees to see a list of all members marked with some outstanding fees:

At the top the total outstanding is shown, along with how much is due to be collected automatically.

The Auto Pay column contains a cross where the user is Unregistered. It is marked "Blocked" if a user is Registered but has chosen to block payment this way. It shows a date where a future auto-payment collection is scheduled.

From this screen you can edit individual members (perhaps to mark them as paid manually if you are aware they have paid). You can also email all members to send a chasing message.   The red envelope indicates there is no email address stored for that member.

If you hover over the icons or dates on the screen a tool tip appears.

10.2. Reporting

The club will receive an email with a report when auto payments are attempted which shows which succeeded, which failed, which have been blocked by users, and which members are not registered so cannot use Auto Pay.

Membership auto pay transactions for Lake Macquarie Bridge Club

Hi Fiona,

Auto payment of club membership fees for Lake Macquarie Bridge Club were processed for 26 Sep 2024.

2 membership fee auto payments were charged successfully, with total fees of 75.00.

Member	Membership	Fee
Alan Admin (ABF No 100)	Youth 1-Jan - 31-Dec-25	25.00
Jenna Gibbons (ABF No 636096)	Standard 1-Jan - 31-Dec-25	50.00

1 membership fee auto payment was unsuccessful. Auto payment of these fees will be attempted again tomorrow.

Member	Membership	Fee	Issue
Eric Eastwood (No 104)	Standard 1-Jan - 31-Dec-25	50.00	Bridge Credits payment UNSUCCESSFUL

The following members have disallowed auto payment of their fees. Auto payment will not be attempted again for these membership fees.

Member	Membership	Fee
Julian Foster (ABF No 518891)	Standard 1-Jan - 31-Dec-25	50.00

The following members are not registered with My ABF so are not eligible for auto pay at this time. Auto payment will not be attempted again for these membership fees.

Member	Membership	Fee
Trevor Brown (ABF No 1046241)	Standard 1-Jan - 31-Dec-25	50.00
Patricia Thomas (ABF No 957801)	Standard 1-Jan - 31-Dec-25	50.00
Barbara Lonie (ABF No 691054)	Standard 1-Jan - 31-Dec-25	50.00
John Lonie (ABF No 691062)	Standard 1-Jan - 31-Dec-25	50.00
Elaine Wragge (ABF No 762423)	Standard 1-Jan - 31-Dec-25	50.00
Jo-Anne Marzato (ABF No 767311)	Standard 1-Jan - 31-Dec-25	50.00
Margaret De Pear (ABF No 706574)	Standard 1-Jan - 31-Dec-25	50.00
Anne Corcoran (ABF No 965911)	Standard 1-Jan - 31-Dec-25	50.00
Judy Aubin (ABF No 719226)	Standard 1-Jan - 31-Dec-25	50.00
Dianne Noon (ABF No 725315)	Standard 1-Jan - 31-Dec-25	50.00
Ted Tait (ABF No 382450)	Standard 1-Jan - 31-Dec-25	50.00
Michael Nicholson (ABF No 951961)	Standard 1-Jan - 31-Dec-25	50.00
Kay Brewer (ABF No 952060)	Standard 1-Jan - 31-Dec-25	50.00

11. Paying for Memberships

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

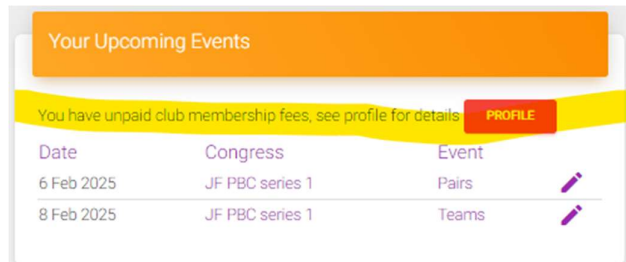There are basically three ways payment can be made:

11.1. Pay outside My ABF

A player can choose whether to pay externally to My ABF – in which case the club updates their membership record to mark it as paid. This is just like someone paying for a congress with a bank transfer.

Alternatively a member may choose to pay through their My ABF bridge credits account. They can either do this manually or enable Auto pay.

11.2. Pay with bridge credits manually
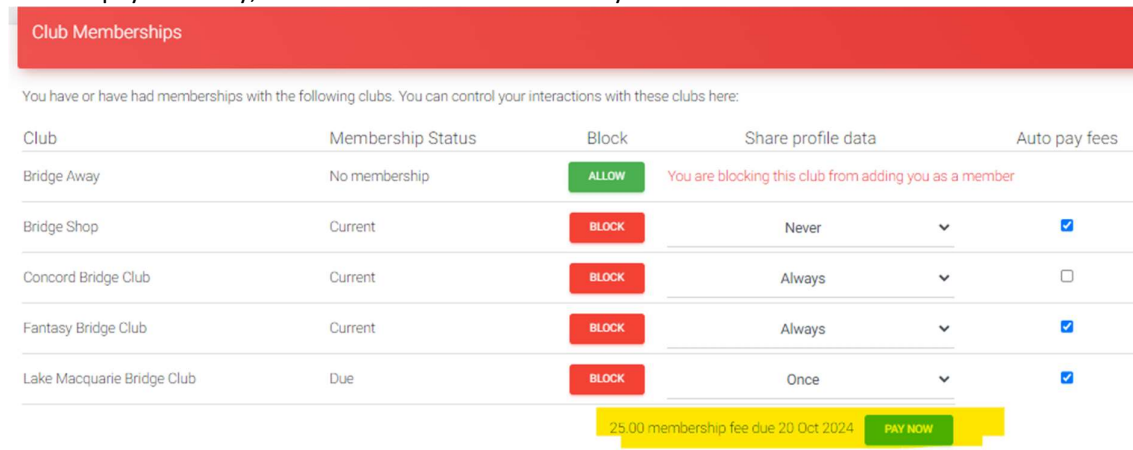
Once a membership renewal has been issued, a player will see a notification in their "Your Upcoming Events" box that they have an outstanding membership payment.

This contains a link to their Profile page where there is a list of the user's memberships together with the various options available for each membership. Where an amount is outstanding there is an option to pay it now (with bridge credits). Where a user has Auto pay set up, there is usually no need to pay manually; it will be collected automatically later.

11.3. Use Auto Pay to pay with bridge credits automatically

Auto Pay is a facility where a Registered user of My ABF can have their annual membership payments deducted from their Bridge Credits account automatically on a set date.

11.3.1. Who can use it?

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

11.3.2. When does it take place?

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

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

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

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

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

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

11.3.4. Can the club see what's happened?

Yes.

Each time auto payments are attempted an email report is provided to the club. This summarises which payments succeeded, which payments failed, and for what reasons. See 10.2 above for an example.

The Unpaid members report will always still show any members with outstanding payments. See 10.1 above.

12. Contacts

Contacts allow a club to keep a list of people who are not members but to whom they wish to stay in touch with (and perhaps persuade to join).   Two obvious such groups are:

- Regular visitors to the club
- Recent beginner lesson attendees

Contacts can have ABF numbers but do not need to. They can just be a name and email address.

12.1. Data fields for Contacts

The same data fields exist for Contacts as for Members.

From here the details can be edited, the Contact can be converted to a member (see 12.4 below) or deleted.

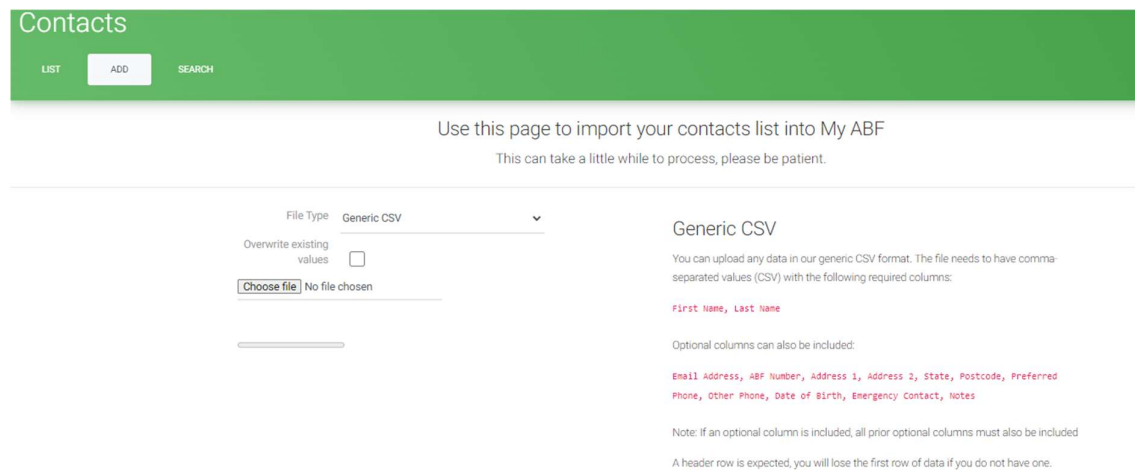## 12.2. Add Contacts – Manual

As for members you can add Contacts either manually or by import.

When you add a Contact manually you can select an existing ABF number (drawn from the ABF Masterpoint Centre) if the person has one. If they don't have an ABF number (common for those attending beginner lessons for example) you can create them separately as a Contact by just adding the name and other details.

12.3. Add Contacts - Import

You can import Contact lists from a generic csv file, a Pianola export file or a Compscore export file.

There are instructions on the page describing the columns available.   There is also a blank Excel template available which contains all the columns already set up. This can be found on the My ABF Resources page on the ABF website: https://www.abf.com.au/member-services/my-abf-resources/clubs/

Once set up the file should be saved as a csv file and can then be used to import from.

When importing Contacts a source file with a record containing an ABF number will be matched with one already in My ABF. Records that do not contain an ABF number will not be matched – therefore it's quite possible to end up importing the same contact more than once if care is not taken.

12.4. Convert a Contact to a Member

It is possible to convert a Contact to a Member. To do this, the Contact must have an active ABF number.

Where the Contact already has an ABF number, the conversion is straightforward. Where the Contact does not have an ABF number, a search is conducted of the Masterpoint Centre records to find potentially matching names. (At the moment creation of new ABF numbers is still done in the Masterpoint Centre – in future that will be part of My ABF).   When the Contact has been matched to an active ABF number they can then be added as a member (note when this occurs the name is taken from the masterpoint centre – so it will update a different name field that may have previously existed).

12.5. Delete a Contact

If you delete a Contact, the records are removed permanently.

12.6. Export Contacts
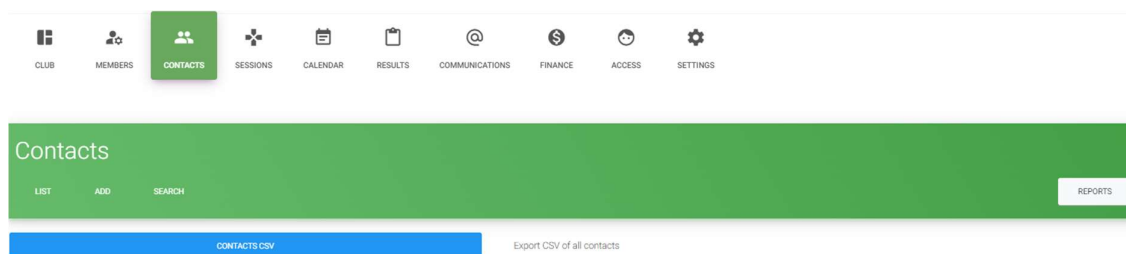
Via the Reports option at the far right of the Contacts screen it is possible to export a csv containing all current Contact details.

12.7. Recent activity

Under the Contact Details is a section where recent activity for the Contact can be viewed.   This section is the same for Contacts and for Members – see section 7.3 of the Members manual for more details.

For an unregistered user the section looks like this:
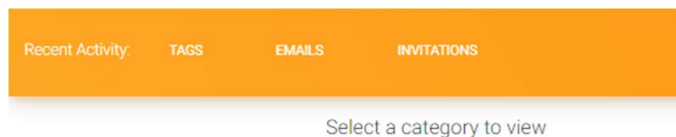
Tags (used for email communications) can be viewed and assigned to the Contact, recent outgoing emails to the Contact can be seen, and it is possible to send an invitation for them to join My ABF from here.

Where the Contact is already a Registered user, it is also possible to view entries, sessions and recent bridge credit transactions for the Contact which relate to the club.
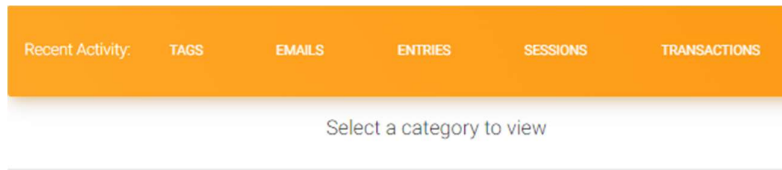
12.8. Where are Contacts used?

The main usage is in the Communication area. When composing a Club email it is possible to include Contacts in the distribution list. There are options to add all Contacts, search Members & Contacts, etc.   It is also possible to assign tags to Contacts and then include them in tagged groups.