HOW CLUBS CAN SET UP FULL MEMBER MANAGEMENT

Last updated: Julian Foster 20/11/2024

Introduction

My ABF offers club two modes of operation around membership:

- Simple member management
- Full member management

Under Simple member management (the default) you can record the list of your members, add assorted details to their records, and you can (if you wish) manually track their period of membership.

Under Full member management you can also track the period of membership, record membership history, issue renewals for your members, track payments and facilitate online payment automatically by bridge credits (members can opt out of this).

This document describes the process for clubs to switch on Full member management. There are two scenarios:

		PAGE
SCENARIO 1	**Your club has not previously uploaded its members into My ABF**	**2**
SCENARIO 2	**Your club has previously uploaded its members into My ABF**	**9**

There are also 3 appendices that are potentially relevant to either scenario:

Appendix 1	**What do the various dates in the membership area mean?**	**15**
Appendix 2	**Importing members (or changes to member data) via a generic csv file**	**16**
Appendix 3	**What happened when My ABF migrated to release 6.0?**	**17**

When you first set up to use full membership management, the system obviously does not know the previous history of your members and there needs to be a starting point for recording membership history. Therefore, there are some transitional arrangements which will apply to the first membership period being established in My ABF. These include assumptions about payment status, start date, etc.

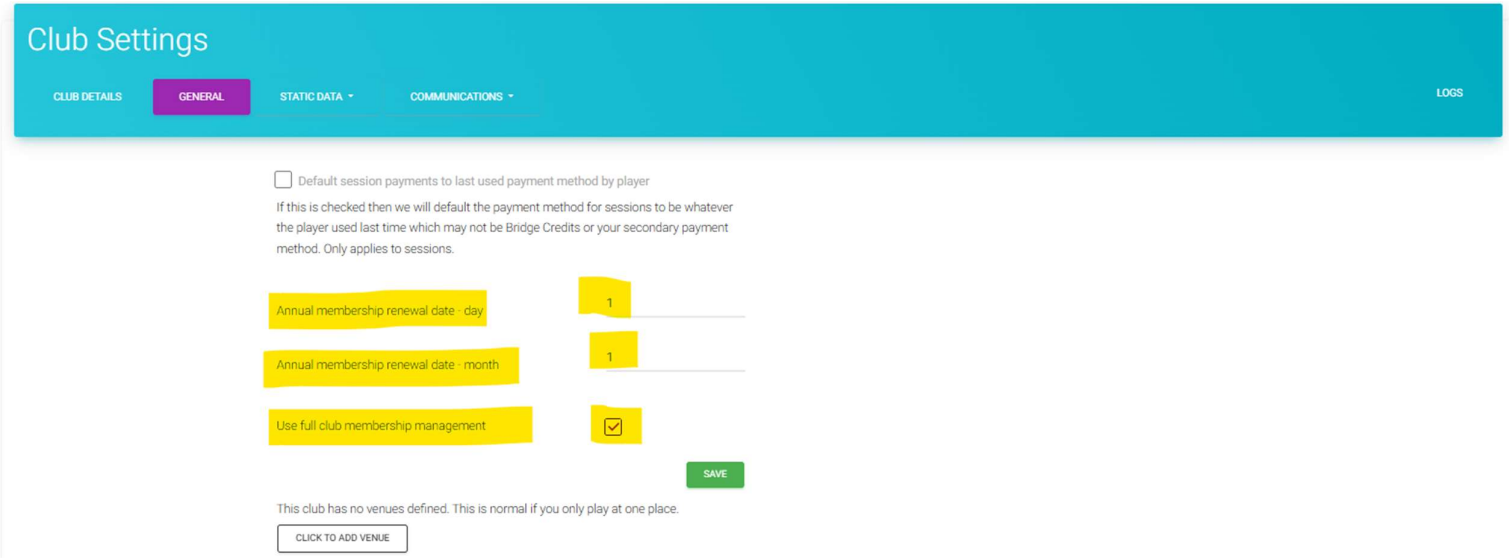
THE PROCESS TO MOVE TO FULL MEMBER MANAGEMENT

SCENARIO 1 – Your club has not uploaded its members into My ABF

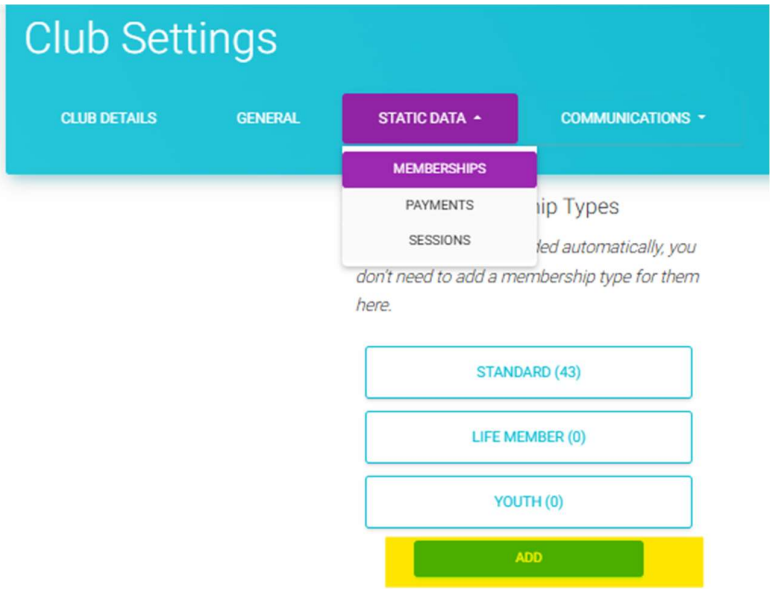
PART ONE - PRELIMINARY SET UP

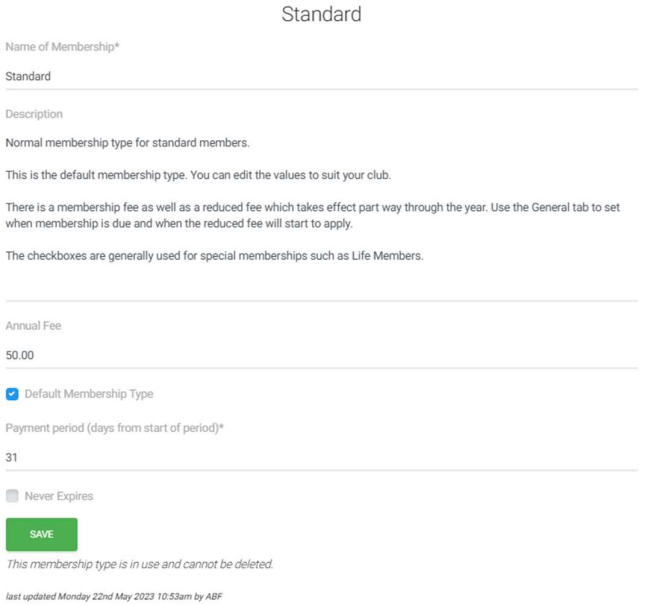
- In Club Admin - Settings – General check the membership renewal date for your club and update it if required (note this is the 1st day of your new period so if, for example, you operate to a calendar year the day/month you want here is 1/1 not 31/12)

- Tick the option to turn on full member management.



- Create additional desired membership types via Settings – Static Data – Memberships (some defaults are provided but you can edit these and/or add your own too).





Note that for each membership type you can indicate if it "Never Expires" – this is typically used for life memberships, or equivalent. For anyone with this membership type it means no end date for the membership will be shown and they will not be included in an annual renewal request.

You also have a "Payment period" which is effectively how many days "grace" you offer to your members (so for example with 31 days as per this example it means they will retain membership rights for 31 days after the period end – say until 31 January if the member renewal period was 31 December). This can of course be edited to suit your club's policies in this area.

PART TWO – ADDING YOUR MEMBERS

*NOTE 1. It's critical to understand that My ABF is fundamentally different to the ABF masterpoint centre - you want **ALL** your members listed in My ABF, not just your home club members. That's because it's ALL your members you might want to send emails to, or who will get member entry fees/table money rates. The home club distinction is relevant to the ABF and it may influence your membership rates – but that's all.*

NOTE 2. Don't just dive in and import a file! It is well worth taking some time to plan first. You only want to do this once so there are several things to consider. What member data do you want? Do you just want current members or former ones? What member types do you want to set up?

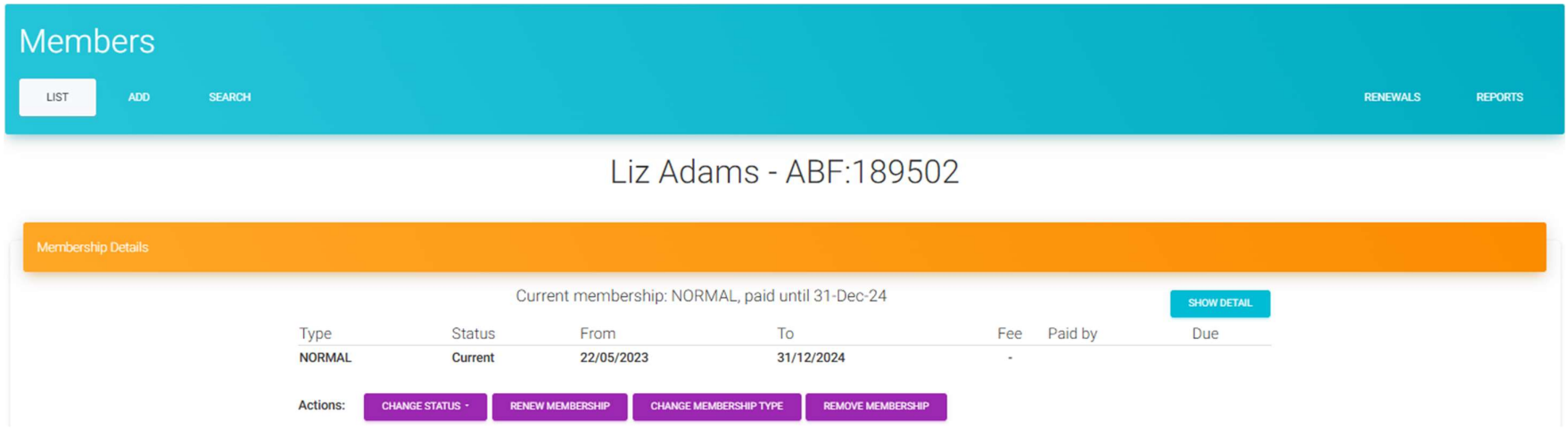
- You can add members manually but it's far more likely you will want to import them from an existing list – perhaps in another system. The Club Membership user guide has a lot more detail about how to do this (section 3).

- There are two broad areas into which information will be imported:
    - Details about the member themselves (email, address, phone, joining date, etc)
    - Details about their current membership (type, $ paid, date paid up to, etc).

  (Exactly what information comes in will depend on your current system and the approach you take – see remainder of the points here for more details). All the records can be manually edited as well.

- You can import members from one of 4 possible sources (ABF masterpoint centre, Compscore, Pianola, Generic csv file). Two key notes:
    - *Using the ABF masterpoint centre will only import your HOME club members. Your non-home club members will then need to be added another way.*
    - If you have multiple membership types a generic csv file has a column where you can specify the type and, provided it matches one set up in My ABF, it will be imported. But all other sources will only import into one membership type at a time (yes even though Pianola has a column for member category) – therefore if you have multiple membership types you may need to break your source file into separate parts and import each part separately. Remember this is usually a one-off exercise. Once your members are in the system there will usually just be minor amendments each year.

- A member record after creation will look something like this:

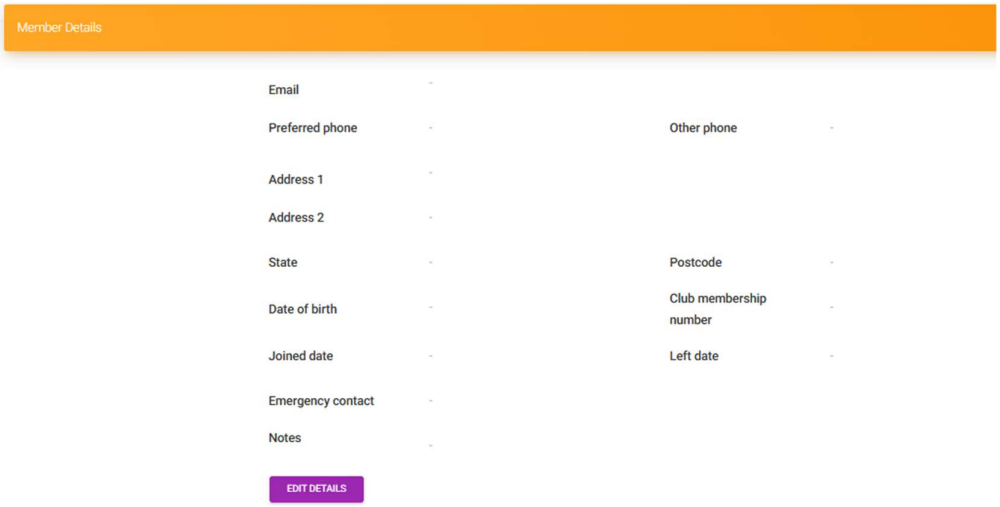


[These purple buttons are how you typically make changes to membership status, type, etc in future.]

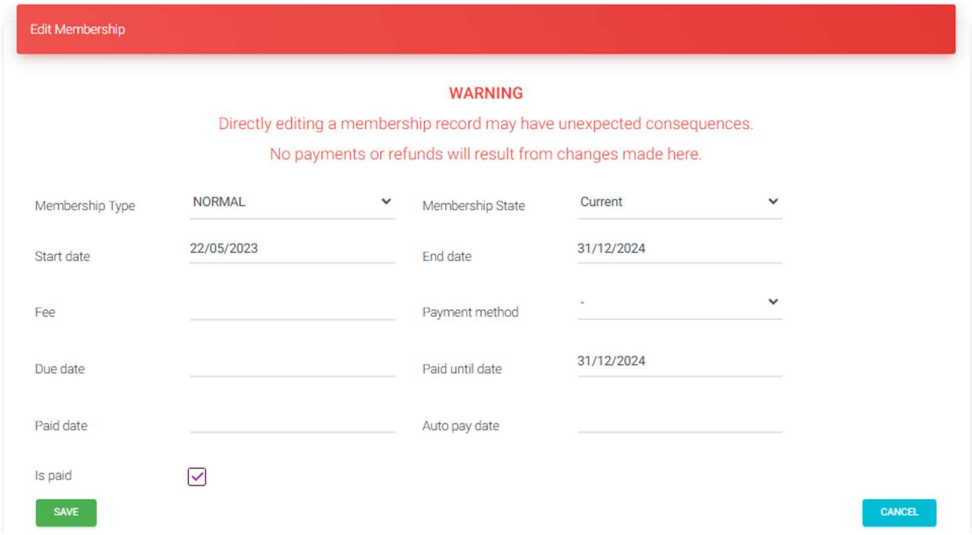
- When an initial membership period is created for each person, it will be assumed to run to the end of the club's current membership year (if you have some exceptions to this they can be manually edited or overwritten later).

- All members will be assumed to be paid for the current year but no actual fees will be shown. These could be manually added if desired (not essential).

Details about the member looks like this. These fields can be imported or manually edited for each member. There are more details in the Membership manual explaining exactly what fields from other systems import.



Details about the membership looks like this:



- You will see a number of dates within this Membership record. Appendix 1 contains details to help understand them. Their initial creation can vary according to the import source – according to the table below:

DATES	Import from ABF masterpoint centre	Import from Compscore	Import from Pianola	Import from Generic csv
THE FIRST CREATED MEMBERSHIP PERIOD:				
Start Date	Date of import (1)	Date of import (1)	Calculated from joining date (2)	Calculated from joining date (2)
End Date (3)	End of current year	End of current year	End of current year	End of current year
Due Date	Based on period set in the Membership type	Based on period set in the Membership type	Based on period set in the Membership type	Based on period set in the Membership type
Paid Until Date (3)	End of current year	End of current year	End of current year	End of current year
Paid Date	Date of import	Date of import	Date of import	Date of import
Auto Pay Date	Blank	Blank	Blank	Blank
WITHIN MEMBER DETAILS:				
Joined Date	Date of import	Date of import	As per import file	As per import file
Left Date	Blank	Blank	As per import file (should be blank!)	As per import file (should be blank!)

NOTES

1. When importing from the Masterpoint Centre or Compscore the default position will start the current membership from the date of import and take it to the end of the club's specified membership year. This is because those products do not have a "Joining date" field (see note 2 below). In reality of course all memberships except new joiners in the current year will be running from the start of the current membership year. At the time the first renewal is processed, a normal full membership year will be created.

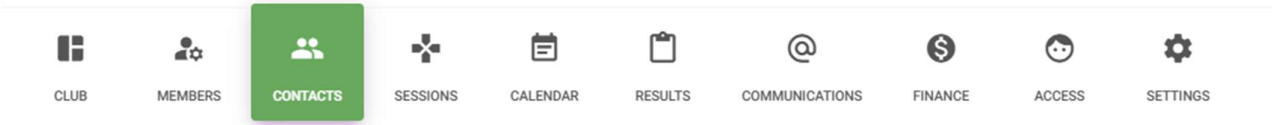
   If a club wishes to reflect the exact position for the current year it is possible at any point to import data into the Joining date field by way of a csv import – to overwrite the defaults.

2. When importing from Pianola or a Generic csv file there is a Joining date field. This field governs the Start Date within My ABF – a joining date within the current membership year is shown as the Start Date; for any joining date before the start of the current year the membership period created will be given a Start date equal to the start of the current year.

3. Membership types that are marked "Never expires" (e.g. life membership) will not show an End Date or a Paid Until Date.

PART THREE (OPTIONAL) – ADDING CONTACTS TO MY ABF

This area is new to release 6.0 and has its own menu item in the Club Admin menu:



"Contacts" are people who are not members but with whom the club wants to maintain contact. Perhaps ex-members, regular visitors, recent beginner lesson attendees, etc.

If you wish to do so, these can be imported from the same sources as members (except the masterpoint centre).

BUT – before doing so, you should consider carefully what you want in My ABF. Don't just blindly import a file! You may well want to do some editing of the export file you get from another system first. For example, Pianola maintains records of visitors from potentially years back. Do you need all of them? Maybe sort what you have and remove older ones.

Note it's possible to import Contacts with just a name and email address, they don't have to have an ABF number (for example many beginner lesson attendees probably won't yet have one). But an ABF number is what is used to check whether someone is unique in the system. Therefore you need to be careful with Contacts as it's possible to upload duplicate names etc.

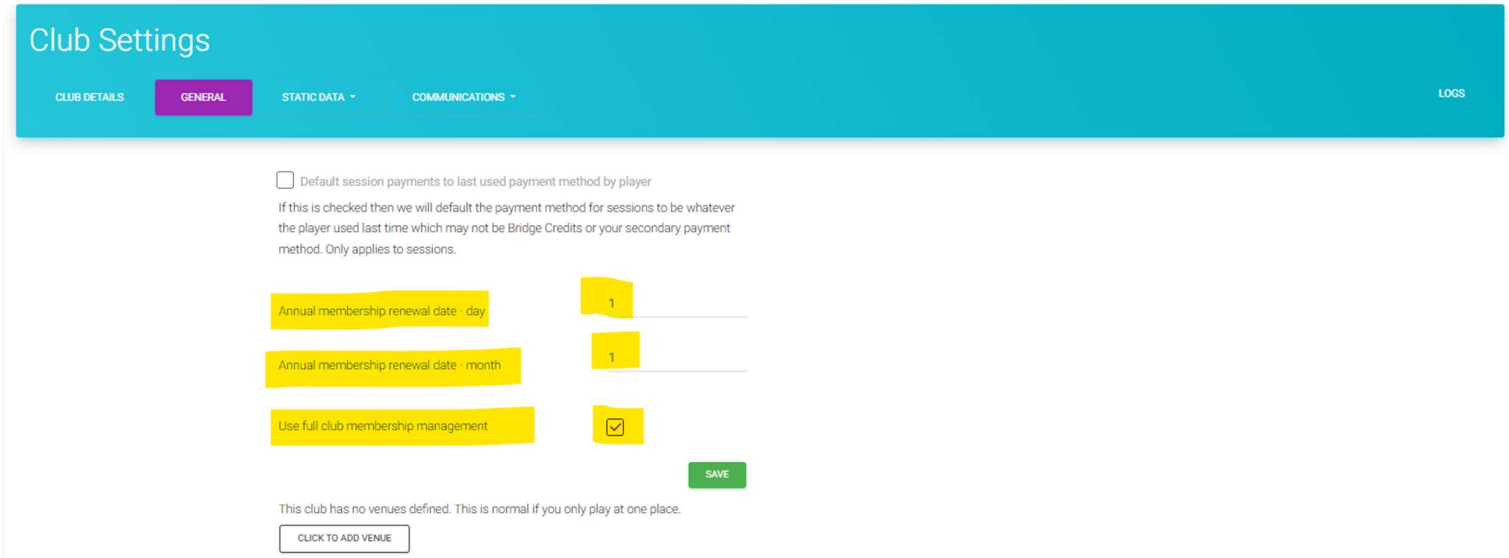
THE PROCESS TO MOVE TO FULL MEMBER MANAGEMENT

SCENARIO 2 – Your club has already uploaded members into My ABF

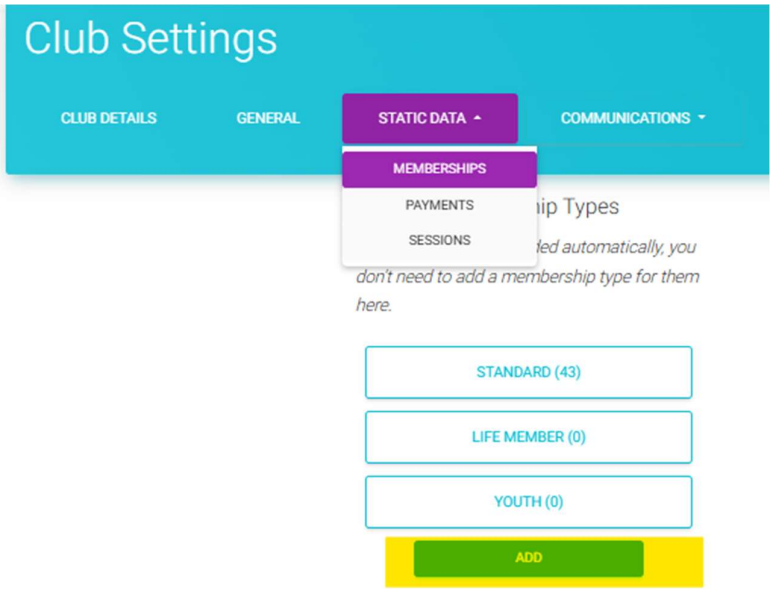
PART ONE - PRELIMINARY SET UP

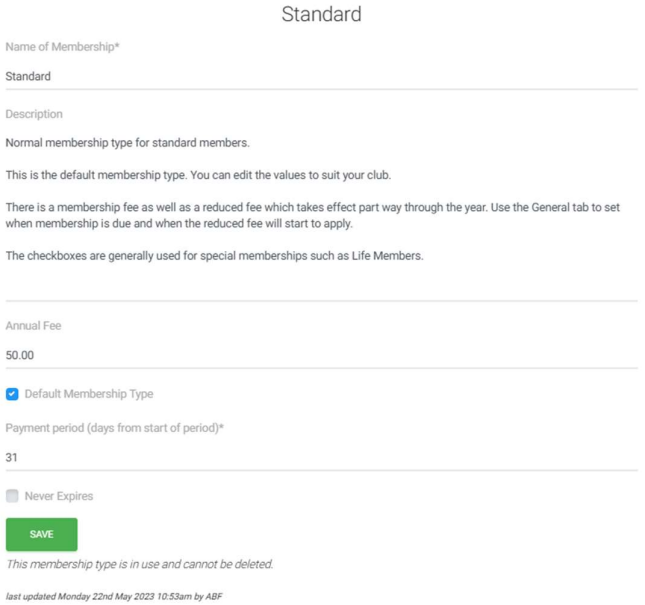
- In Club Admin - Settings – General check the membership renewal date for your club and update it if required (note this is the 1st day of your new period so if, for example, you operate to a calendar year the day/month you want here is 1/1 not 31/12). The default My ABF has assumed is 1/1 but if your club informed us of a different membership year end date we have incorporated it as part of the update to release 6.0.

- Tick the option to turn on full member management.



- Review existing membership types in Settings – Static Data – Memberships. You may have previously created these. Add any others you might want or edit existing ones.





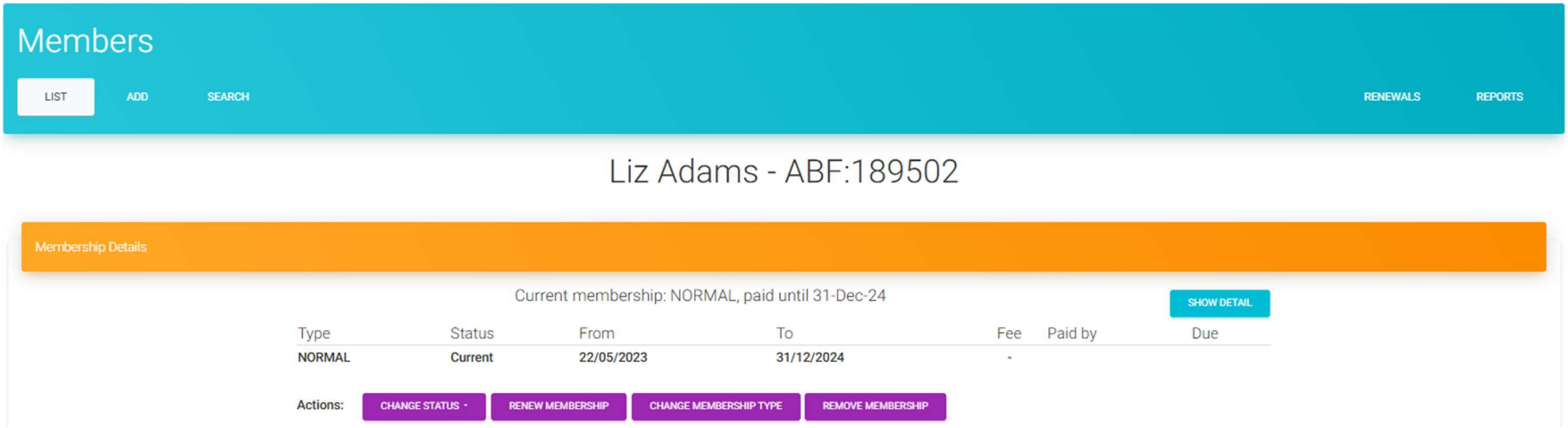
Note that for each membership type you can indicate if it "Never Expires" – this is typically used for life memberships, or equivalent. For anyone with this membership type it means no end date for the membership will be shown and they will not be included in an annual renewal request.

You also have a "Payment period" which is effectively how many days "grace" you offer to your members (so for example with 31 days as per this example it means they will retain membership rights for 31 days after the period end – say until 31 January if the member renewal period was 31 December). This can of course be edited to suit your club's policies in this area.

PART TWO – REVIEW YOUR EXISTING MEMBERS

- The first thing to check is whether you actually have all your members in the system to start with! Remember My ABF is fundamentally different to the ABF masterpoint centre - you want **ALL** your members listed in My ABF, not just your home club members. That's because it's ALL your members you might want to send emails to, or who will get member entry fees/table money rates. The home club distinction is relevant to the ABF for capitation fee purposes and it may influence your membership rates – but that's all. If you previously imported members from the Masterpoint Centre you may only have your home club members in My ABF and that's not what you want going forward.

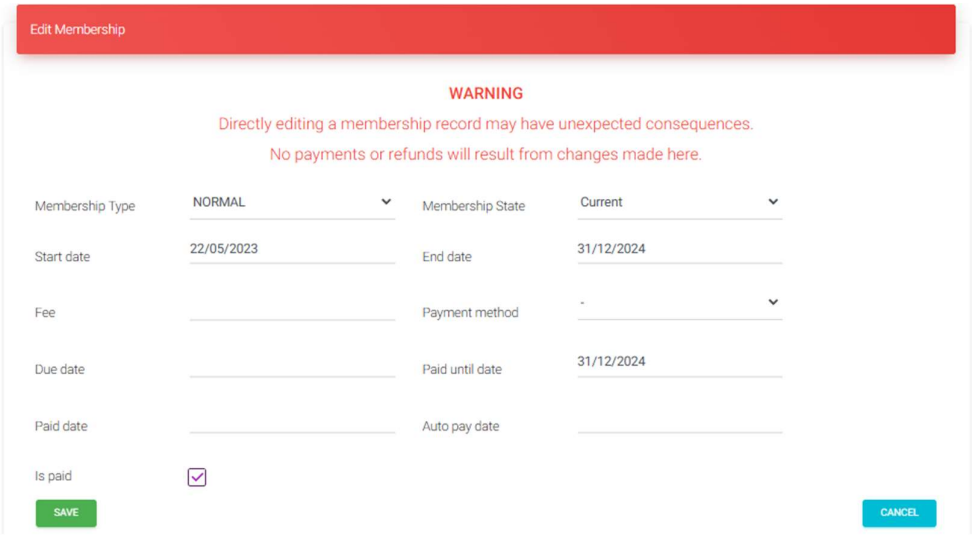
- The next thing to check is the membership periods. A member record will now look something like this:



[These purple buttons are how you typically make changes to membership status, type, etc in future.]

- Existing members will have all been given a current membership period with Start date equal to the date Release 6.0 was deployed and End date equal to the end of the club's current membership year (except for memberships that don't expire). This end date is assumed to be 31 December unless we were informed otherwise before release 6.0 was deployed (we have attempted to gather up year-ends for clubs who do NOT operate to 31 December and set them up – both through a My ABF survey sent to all clubs and a specific email sent to clubs who had members set up in My ABF).

Details within a membership look like this:

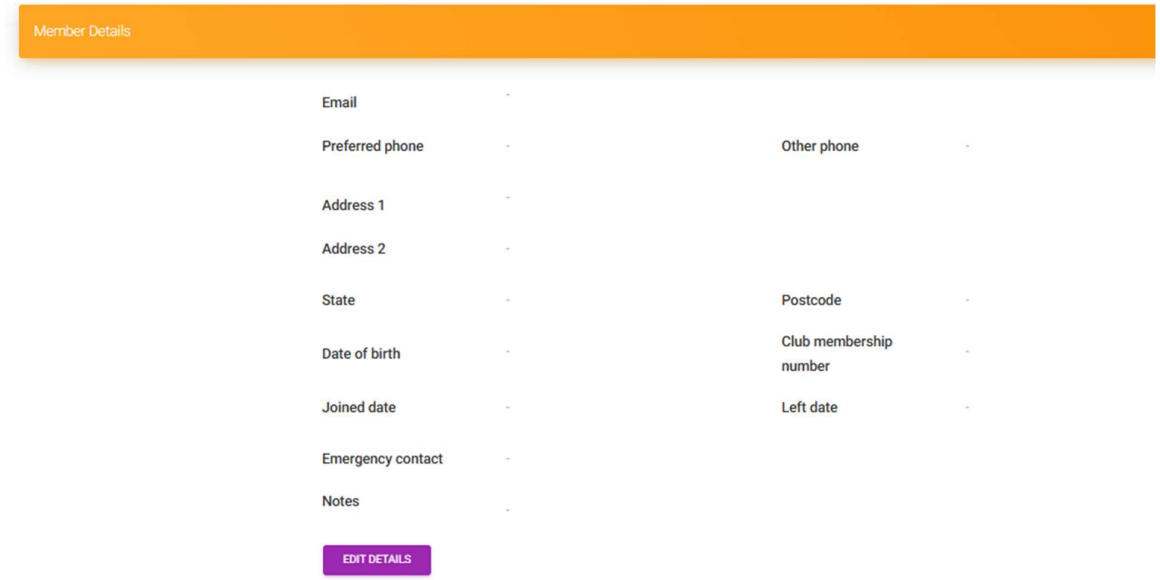


- An explanation of the various dates relevant to memberships is contained in Appendix 1.
- Existing members (other than life members) will all be assumed to be paid to the end of the current membership period.
- If the existing membership periods are not correct it is possible to import a member listing via a csv file which will overwrite the period Start and End dates. See Appendix 2.

PART THREE - UPDATE MEMBER DETAILS

There are a lot of new data fields available for members in release 6.0. It is likely you will want to import information for your members from another system (ABF masterpoint centre, Compscore, Pianola or using a generic CSV file) to update your records.

Details about the member now looks like this:



PART FOUR (OPTIONAL) – ADDING CONTACTS TO MY ABF

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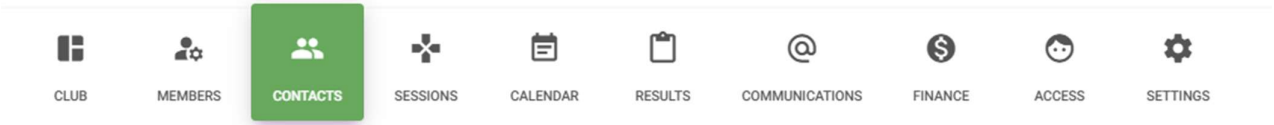

"Contacts" are people who are not members but with whom the club wants to maintain contact. Perhaps ex-members, regular visitors, recent beginner lesson attendees, etc.

If you wish to do so, these can be imported from the same sources as members (except the masterpoint centre).

BUT – before doing so, you should consider carefully what you want in My ABF. Don't just blindly import a file! You may well want to do some editing of the export file you get from another system first. For example, Pianola maintains records of visitors from potentially years back. Do you need all of them? Maybe sort what you have and remove older ones.

Note it's possible to import Contacts with just a name and email address, they don't have to have an ABF number (for example many beginner lesson attendees probably won't yet have one). But an ABF number is what is used to check whether someone is unique in the system. Therefore you need to be careful with Contacts as it's possible to upload duplicate names etc.

APPENDIX 1 – WHAT DO THE VARIOUS DATES MEAN?

There are a lot of dates involved with memberships! This table explains what they all are and how they work:

Area	Dates	Explanation
Membership record for each period	Start and End dates	The start and end of the current period of membership. All memberships must have a start date, but membership types designated as "never expires" (e.g. life members) do not have an end date.
	Due date	The date members are due to pay by. It also influences when a membership might lapse: • If it's on or after the end of the current period, it's the date a membership will lapse if it is still unpaid then. • If it's before the end of the current period, the membership will lapse at the end of the current period if still unpaid then. By default it is arrived at by adding the payment period (specified in the membership type setup) to the annual renewal date (for example a calendar year end and a 31 day payment period would make this 31 January – effectively allowing a "grace period" into the next period to pay before the membership lapses). It can be edited to be anything the club wants.
	Paid date	The date the member paid for that membership period (will be the same as Auto pay date if paid that way).
	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).
Member details	Joined date	Date the person first joined the club.
	Left date	Date the person left the club.

Dates when switching from Simple member management to Full member management

If you manually create a member in Simple mode then, assuming you don't delete anything, you get a period from the date of creation to the end of the current year. Joined date is also populated with the date of creation. Other dates are blank.

At the point of conversion to Full mode the Start Date, End Date and Joined Date come across. Due date is created (31 days on from creation date by default). Paid Until, Paid and Auto Pay dates are blank.

APPENDIX 2 – IMPORTING MEMBERS (OR CHANGES TO MEMBER DATA) VIA A GENERIC CSV FILE

It is possible to import members from assorted sources as outlined earlier. After you already have members in the system you can re-import from the same source, this time with "Overwrite existing values" ticked. That lets you update details in bulk as well as add new members to My ABF.

You can also use a generic csv file to update assorted details – one of which might be Start and End dates for a period. The generic csv file recognises the following columns:

- ABF number
- First name
- Last name
- Email
- Membership type
- 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

My ABF provides an Excel template with these headings already set up but it is equally possible to use your own.

So you could, for example, export your current member listing. Then re-import it with adjusted data – e.g. to shift the start or end dates of the membership periods (this might be pertinent if you do not have a 31 December year-end but never informed My ABF of this so it was defaulted).

APPENDIX 3 - WHAT HAPPENED WHEN MY ABF MIGRATED TO RELEASE 6.0

Some new data fields were introduced for Clubs which are relevant to those wishing to use the full membership management facilities. Some default values were provided – clubs may wish to visit this area to change those defaults.

Club Settings – General

The following new data fields were introduced – with the following settings created as defaults upon migration:

Annual membership renewal date – day	1
Annual membership renewal date – month	1 (i.e. Jan)
Use full club member management	UNTICKED (i.e. in Simple mode)

Where we had information from clubs about using a different year-end for membership purposes, we factored that into the migration and inserted those values in for the club.

Club Settings – Static Data - Memberships

A new field was introduced for each membership type – called Payment period (days from start of period).

This field is used to generate a "due date" for membership payment – effectively what "grace period" the club offers for payment after the renewal date before the player's membership will lapse.

It has been defaulted to 31 days. This can be edited for each membership type.

So for example a club with a 31 December membership year end will, by default, generate a "Due date" of 31 January. If that date passes without payment being made, the player's membership will lapse.

For clubs that have existing members

Immediately after migration all clubs were in Simple member management mode (because the full club member management box is unticked). Each member will have one membership record created. It is a transitional opening period and is made up like this:

Data field	Initial status
Membership status	Current
Paid status	Paid
Start date	Date Release 6.0 goes live
End date (1)	End of the current club year (2)
Paid until date	End of the current club year (2)
Paid date	Blank
Due date	Blank
Auto pay date	Blank
Joined date	Blank
Left date	Blank
Fee	Blank

(1) Membership types that are marked "Never Expires" (e.g. life memberships) will have no End date.
(2) This will be 31 December 2024 unless the club has informed us they have a different year-end, in which case that will have been taken into account during migration and the relevant end-date inserted both into the Club's general settings and the individual period for the members.

When a renewal is initiated a normal 12 monthly membership period will be generated for ongoing use.