RELEASE 6.0 - OVERVIEW

Last updated: Julian Foster 20/11/2024

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1. Introduction

Release 6.0 introduces powerful but simple club administration functions to allow clubs to manage their membership records and annual renewal processes within My ABF and simplify the collection of membership fees using Bridge Credits.

The core areas of change are the ability to:

- Create and maintain a "Contact" list as well as a Members list. This list can be used in the Communications function to email contacts.
- Create membership records. Clubs will be able to track a player's membership history with the club including changes in membership type and status over time.
- Record more membership information with the addition of more data fields in the membership record.
- Enable Registered users to control some aspects of their club records.
- Issue membership renewals both individually or in bulk.
- Facilitate payment of membership renewals by bridge credits either manually or via automatic payment on a set date. Clubs will be able to mark payments made by other methods.
- Manage unpaid renewals and issue reminders etc.

There is a general option for clubs to operate with "Simple member management" or "Full member management". This guide describes the full features. Simple member management does not include tracking member records over time or any payment aspects.

Initially all clubs will be set to the simple mode. A simple migration guide is available to help clubs when they first switch to full mode (the procedures to follow will vary slightly depending on whether they already have members listed in My ABF or not).

2. Contacts

There is now a new item in the Club Admin menu:
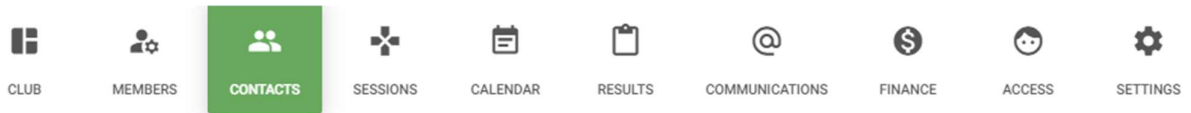
- Here you can list non-members and include them in club communications when suitable. For example these could be regular visitors, former members or those attending beginners lessons.
- Contacts can be people with or without ABF numbers. They simply can be a name and an email address.
- Contacts can be added manually or by import in the same way as Members.
- Contacts with an active ABF number at the time can be converted to Members.
- When a Member is removed from your club they initially become a Contact.
- Contacts, like Members, can be given tags to form groups to assist with email communications.

3. Member data fields

A member's record now consists of many more data fields

Some of these data fields (green tags above) can be copied by a Registered My ABF user from their personal profile (and, if desired, linked thereafter) to avoid them being maintained in two places.

Most of these data fields can be imported from existing member management systems (Pianola or Compscore) or by a generic csv file (for which a template is available).

4. Registered user control of club memberships

Registered My ABF users will have a new area in their Profile page where they can influence their club memberships:

Where a club first adds a Registered user as a member in My ABF an email notification is sent to the player and a listing will appear in their personal profile here. There are 4 things the user can then do:

1. **Block it** – i.e. indicate that they are not in fact a member of this club and the club should not have added them (this will remove them from membership and prevent the club adding them again). The block can be removed later if desired.

2. **Share profile data** – i.e. indicate they are happy for personal information from their My ABF profile page to be copied to the club membership record so it doesn't have to be maintained twice (this can be set to happen always, once or never).

3. **Auto pay fees** – i.e. indicate they are happy for the club to collect their annual membership fees through their bridge credits account on a specified day after a membership renewal is issued to them. These payments go through at 11pm East Coast time on the specified day (although obviously will only succeed if the player has sufficient credits in their account at the time or has auto top-up selected).

4. **Pay Now** – where a renewal has been issued, ~~the~~ a Pay Now button ~~that~~ appears ~~here~~ that can be used to pay the renewal immediately with bridge credits (instead of Auto pay).

5. Member listing

The club's listing of members has been expanded to include the membership status and the member's bridge credits balance (if a Registered user). There is also an ability to view former members as well as current ones.

From this listing club administrators with membership rights can:

- Open a member's detail record – which includes the membership record (see 7 below) and the member's individual details (see 3 above).
- Initiate a bulk renewal (see 0 below).
- Export member reports (see 6 below).

6. Member reports

From the listing it is possible to export csv listings of either your current members or all your members (i.e. including former members as well).

7. Membership records

Each member of the club now has a Membership record:

Lucy Likeable - ABF:111

Membership Details

Current membership: Standard, paid until 31-Dec-24, 50.00 membership fees to pay   SHOW DETAIL

Type	Status	From	To	Fee	Paid by	Due
Standard	Future	01/01/2025	31/12/2025	50.00		01/02/2025
Standard	Current	01/01/2024	31/12/2024	50.00	Cash	

Actions: CHANGE STATUS ▾   MAKE PAYMENT   REMOVE MEMBERSHIP

Over time this will build up to a record of the member's history with the club – a separate line is created for each year, or each significant change (of type of status).

The current membership and any future renewal issued are shown here. Older records are hidden but can be accessed via Show Detail.

Here the club can:

- Change the status of the membership (lapsed, terminated, resigned, deceased)
- Change the type of the membership (e.g. standard – life, youth – standard, etc)
- Record payment (either by charging it to bridge credits or by marking it as paid if the player has paid by another method outside My ABF)
- Remove the membership
- Renew the membership individually (this would more commonly be done in bulk – see below)
- Directly edit the details of the membership records (via Show Detail) – this shouldn't normally be necessary but is available in case a manual override is required for some unusual circumstances

Some changes in membership status happen automatically based on the date as well (they are processed at 3am East Coast time each day) – for example:

- At the due date - a membership moving from "Current" to "Lapsed" where a renewal has not been paid
- At the end date - a membership moving from "Future" to "Current" (if paid) or "Due" (if unpaid)

A membership log is maintained recording the main status changes for the membership:

Membership Log

Add a comment to the log   ADD

Date	Description	By
01/10/2024 06:54 PM	Standard membership extended from 01-01-2025 to 31-12-2025	Lucy Likeable (ABF: 111)
01/10/2024 06:26 PM	Membership manually edited: Standard (Current) 1-Jan - 31-Dec-24	Lucy Likeable (ABF: 111)
01/10/2024 06:21 PM	Updated with data shared by member	Lucy Likeable (ABF: 111)

Administrators can also add manual entries to this log.

8. Membership renewals

Renewals for an individual member can be initiated from the Member record as above.

More commonly, however, a club would issue an annual bulk renewal to all its members which can be done from the member section.

Here a club can:

- Select the membership types to include in the renewal
- Amend the pre-filled membership period, fee, due date and auto-pay date if required (auto pay date is the date that, for those accepting the option, the charge will be made to players' bridge credit accounts)
- Select a club email template to use for the renewal email
- Review the club's wording to be included on all the emails (renewal details are automatically included in a second section – these vary depending on the user's status and whether they have enabled auto pay)
- Review the members to be included
- Preview the email for each member as required
- Proceed with the renewal (this will issue emails to players and create a new membership period for each member marked "Future")

9. Subsequent renewal management

After a renewal has been issued it is possible to manage outstanding memberships and an email can be sent to chase all members with outstanding fees.

Where Auto pay is set up for a member the date that payment will be collected is shown here.

When Auto pay is attempted, email notifications are sent to players when payment succeeds. An email report is also sent to club administrators summarising what took place: