



ADMINISTRATION (AD) GUIDE

1 INTRODUCTION

Following the inception of StepBridgeUK, most of the administration functions are now the responsibility of the Committee of the organisation. Within the organisation, there is a defined UK Administrator, together with assistants with full responsibilities.

The Administrator's responsibilities broadly involve:

Portal Facilities

Payments/Reconciliation

Reminders

Mass Mailing

Support

(Website)

Tournament Amendments

Administrators are identified with an 'AD' prefix to a normal username, and require a different password to their normal username.

1. PORTAL FACILITIES

Having logged-in to the standard portal (<https://portal.stepbridge.co.uk/>), the Administrator is presented with eight facilities:

1.1 Profile

The profile facilities are the same as for a normal member: - ability to change email address, results of tournaments (but an Administrator would not normally participate in tournaments using their administration moniker). An Administrator will not normally be a member of a club.

1.2 Change Email Address

This has the same functionality as for a normal member – i.e. change of email is confirmed when clicking on a link in the email sent (to the new address).

1.3 Retrieve Password

This has the same functionality as for a normal member – i.e. email sent with the password reminder.

1.4 Participation Points

An Administrator can order Participation Points for personal use (but does not usually participate in tournaments using their administration log-in).

1.5 Clubs

A list of all Clubs registered with StepBridgeUK. Note, not all these Clubs are active. Each Club is given a unique identifier. When a new Club is added ('Add'), it is given the next sequential identifier.

There are two editing functions available:

Click on the Club Name and the standard Contact administration screen is shown, whereby the Administrator can undertake any of the Contact functions (plan or amend event, add members, etc.). The 'All Events' link shows the history of all previous events, including the number of players, the TD, and the results.

Click on 'Edit' alongside the Club name. This enables primarily the Club Name to be amended (any history associated with the old name is retained). The only other important field is 'Username responsible for paying' – see 1.7.1. The other fields can be ignored (left blank).

1.6 Tournaments

This displays all the UK tournaments, past, and future planned. For each tournament, the Administrator can 'Edit', 'Amend Boards', 'Delete', but these functions are only meaningful for future events.

Importantly, the Administrator can replicate a series of past event, in order to plan future events. Place a 'tick' (Dup column) against an event or series of events (usually four). The 'Duplicate Following Week', adds these series of events to the next week's schedule, duplicating all the event parameters, for the corresponding dates. It is recommended that the plan is maintained such that at least the next two-weeks are showing. You may make adjustments to these future events, using the 'Edit' function.

Should a one-off event need to be added, use the 'Add' function.

1.7 Process Sign-Ups

When a player requests membership of StepBridgeUK, the request is displayed on the initial screen. This request has to be processed by the Administrator.

Use either the 'Process' against each name (recommended), or the block 'Process' whereby each new request will be shown in turn for processing.

On the Process display, the profile of the submitted player is shown. The Administrator has to ensure that this is a new request, rather than a duplicate request from a current member. The system will advise the Administrator on any matches of Email Address (Em), Address (Ad), Surname (Na), or NBO Number (Nr). The Administrator should then check against these names (see 1.8) to verify that it is actually a new member request (this may involve a phone call to the number submitted in the new profile), or that the player is genuinely requesting another different Username (this situation should only be accepted by exception to avoid confusion).

If the request is accepted (i.e. genuine new member, or approved duplicate), then click on the system generated Username.

If the Username already exists, then the Administrator has an option to 'Renew' the submission – the primary purpose being to re-email the player's credentials (lost or forgotten).

If it is a genuine new member, the Administrator may need to overwrite the system generated Username with an alternative (up to 8 characters) – he is advised if the Username already exists. Enter a new Username and (click ‘enter’), then ‘Accept’. The player will then be sent a welcome email.

The Administrator can refuse the submission - ‘Delete’ -, or when processing a list of names ‘Skip’ the current request, and continue to the next one (no action will be taken against the current request).

(Note – the ‘Replace’ facility should not be used).

If someone provides insufficient information (e.g. ‘firstname’) the ‘Show Incomplete Sign-Ups’ facility should be used. This sends an email to the player, requesting a return email giving full information. To then handle the interrupted request, the request needs to be re-spawned from the ‘Un-processed Sign-Ups’ link (otherwise a complete new sign-up is required).

1.7.1 ‘Club Membership’ (paying for members).

Some clubs prefer to pay for their members’ participation within their own club events. They either charge an annual membership fee (for unlimited participation in their events), or manually invoice members for each event played.

The club needs to submit a pseudo player membership request, with the format ‘Member(Club Name)’, where ‘Member’ is usually the club person responsible for the finances (treasurer). An example is ‘Andrew(Newtown)’, where ‘Andrew’ will be responsible for the finances of the Newtown Club.

The Administrator can identify this request, and process as if a normal member (1.7), and then create a pseudo member username ‘Payxxxxx’ (maximum of 8-digits). This is the username that can be used by the Club for ordering Participation Points. Also, he needs to locate the club (via the ‘Clubs’ (1.5) link), - ‘Edit’, and in ‘User name responsible for paying’, enter ‘Payxxxxx’, where ‘xxxxx’ is an abbreviation of the club name (e.g. from above - ‘PayNewto’). This then links the payer to the club.

Also enter ‘ppoints’ in the ‘Notes’ field on this same screen.

Important – the Administrator needs to also set the status of ‘Payxxxxx’ to ‘9’ (see 1.8.1). i.e. via this linkage, players playing in that club will not be debited any personal

Participation Points.

1.8 Members

The Administrator can view the details of a member by searching for them on specific criteria. Some of these are unique (e.g. 'Username'), whereas some may be generic (e.g. 'Surname'). For unique criteria, the information for the member is shown directly, whereas for more generic criteria, a screen is shown from which the administrator can identify the specific member.

(Note on this screen: 'Reference' refers to the reference given to a Participation Point purchase; 'Category' is not relevant to the UK operation).

Having located a specific member, full details about that member are shown. The display is split into seven sections:

1.8.1 User Profile

– that supplied by the member on registration, together with a summary of their participation to date. Most details can be amended by use of the 'Edit' at the top of the display.

Important Edits: -

1.8.1.1 Any user profile data – e.g. change of telephone number.

1.8.1.2 Status

- 1 – 'terminated'
- 2 – 'defaulter' (after 4 reminders sent)
- 3 – 'deceased'
- 4 – 'suspended for ever'
- 9 – 'pseudo member' – i.e. a club paying on behalf of its members.
- 10 – 'trial user' – all new members are given this status
- 20 – 'full member' i.e. those who have paid a full membership subscription

(not relevant for the UK)

(- 20+ - special users, e.g. some Tournament Directors, and Administrators)

- 50 – Senior Tournament Director

- 60 - Administrators

1.8.1.3 'Email is Correct' – if a user doesn't wish to be sent any emails. This is a convenient way of discontinuing a player's membership without actually deleting their profile.

1.8.1.4 Participation Points

By clicking on the number, the administrator can see all the tournaments pertaining to the player and an associated trail of their PP usage. The balance can be amended (plus or minus). This can be useful in order/payment reconciliation, or giving 'good-will' points. When actioning this, a reason must be supplied (max 45 characters) – see also 1.8.4

1.8.2 Results

The only relevant link, is 'Tournaments', giving a list of all the played-in tournaments for the member. For each tournament the overall and personal results can be viewed. A duplicate Results email can also be sent.

By clicking on a specific tournament, the administrator can view the details of that tournament, and effectively replicate the planning function for that club.

1.8.3 Club Membership

A list of all the Clubs in which the member is registered

1.8.4 Memos

A list of all or specific Memos relating to the member. These are primarily reminders of any edit actions undertaken by the Administrator in relation to the member (e.g. why points have been added/subtracted).

It is good practice for the Administrator to create a memo for any amendments made to the player.

1.8.5 Last Memberships

Irrelevant for the UK

1.8.6 Orders

A list of all the orders placed by the member. Each of these is given an 'identity', which is useful in the order/payment manual reconciliation process. The Administrator can 'cancel' any orders. When cancelling an order for 'x' PPs, the member's PP balance is also reduced by 'x'.

The Administrator can order PPs on behalf of a member – click on 'All Orders' 'Add'. A confirmatory email will not be sent to the member in this situation (but PPs will be added to the member's account and shown as 'support'). This facility is particularly useful when a member's payment amount differs from the value of the PPs ordered. This create/cancel facility is in essence a means by which a PP order can be amended.

1.8.7 Transactions

A list of all the transactions made against a member's account. This includes any bank payments for PPs.

1.8.8 Other Tabs

'Edit' – the Administrator can amend any of the member's basic details

'Membership' – not relevant for the UK

'Trial' - the Administrator can re-send the welcome Email (following registration)

'Actions' – the Administrator can reset the member's password. The new password is then displayed.

2. PAYMENTS/RECONCILIATIONS

(Prior to any actions, the Administrator must log-in with their administrator identity).

Periodically the Administrator should reconcile any payments made with any PP orders outstanding. (I would suggest weekly for the previous week). It is important that the data supplied to the reconciliation process does not contain any overlapping imports from a previous reconciliation run, so always export with a starting date the day after the previous export (and always export whole days – usually automatic from the bank).

2.1 Download/Import

The Administrator should import a .csv file from the relevant bank account. The field placement within the .csv file has been pre-determined, and must not be altered.

In the browser bar enter '<https://portal.stepbridge.co.uk/bankimport>'. Find the file on the computer, and then 'Import'.

This will give a list of **all** the transactions for the date range required.

2.2 Processing

The downloaded .csv file is then processed by '<https://portal.stepbridge.co.uk/bankimport/process>'. The system will attempt to match the supplied reference number with the order placed by a member. It will ensure that the payment amount is correct and will check the payer's name against the membership record.

All the transactions submitted for automatic reconciliation will then be shown. A member's record will have been updated with any matched transaction (1.8.7)

Refresh the page, and only the non-matched transactions will be shown. These will then require manual reconciliation.

2.3 Manual Reconciliation

All non-matched transactions need to be processed. Click on the transaction id of any transaction. A new screen is shown.

On the 'Link To' entry, choose either 'Participation Points' and 'Other' (these are the only relevant categories). Click 'Ok'

2.3.1 'Participation Points'

The main reasons for non-matching are (there are others):

- a) Name mismatch – where the member's name differs from the bank account name (this is not checked)
- b) Incorrect Reference Number
- c) Overpayment
- d) Underpayment

Initially the Administrator should 'copy' the reference number shown, and use this to search for the member.

If the record is found, then if a) or b) and the record can be found, the transaction will be shown in green in the 'Link' field and after checking, 'Ok' the transaction.

If b) the Administrator can search on the User's Surname (see 1.8). Having checked the transaction, note the order transaction id. This should then be entered into the 'Link To' field on the previous display. Press 'ok'.

If c) or d), and the transaction is found, then the Administrator will need to cancel the order and replace with an order for the correct amount (see 1.8.6). (This is a preferred procedure to just amending the Participation Point balance, since a Participation Point order audit trail is generated). Having done that the new order id needs to be entered into the 'Link To' field on the previous display. Press ok.

(If the amount paid is not an amount recognised for Participation Points, the balance will

need to be updated without a matching order; the transaction will then need to be classified as 'other')

2.3.2 'Other'

This effectively ignores the transaction. The most common use of this is in handling any debit bank transactions (shown as a minus amount). Another use is if the transaction is not to be linked to an order as a result of the Administrator having manually amended a Participation Point balance rather than raising a new order.

3. PAYMENT REMINDERS

Periodically the Administrator should assess any Participation Point payment reminders.

In the browser, enter '<https://portal.stepbridge.co.uk/purchase/notify>'. This will list all members who have outstanding payments for previously ordered Participation Points.

The display shows: 'payment status before', 'mail status before', 'order date', 'userid', 'last login date', 'username', 'payment status after', 'mail status after'.

Within the display, the number of reminders previously sent is shown (second entry). If this is showing '3', any further reminders will result in the member being temporarily suspended (their status will be amended to '2').

(It may be worthwhile the Administrator contacting members who are showing the number of reminders sent = '3', to warn them of impending suspension)

To actually send further reminders, enter '<https://portal.stepbridge.co.uk/purchase/notify/true>'. This will the automatically send a further reminder to all the members on the list (currently individual members cannot be isolated), and the number of reminders sent will be incremented by '1'. If this then becomes '4', the member is temporarily suspended, and their status is amended to '2', preventing them from entering further events.

4. MAILING

4.1 VPN Installer

The StepBridge software includes a mass emailer; emails are sent directly from the server. For security reasons when logging into the administration area of the WordPress website, this requires a dedicated VPN (NORD VPN – supplied by StepBridgeInt),

To install the VPN see [NORD VPN Installation](#)

Having installed and activated the VPN, the VPN is already 'whitelisted', but if the Administrator has a fixed IP address, StepBridgeInt can 'whitelist' it thereby bypassing the need for the VPN.

4.2 Mailer

To use the mailer, the Administrator must first log-on to the StepBridgeUK website, and then start the Mailer via <https://portal.stepbridge.co.uk/mailer>

On the 'Mailer', only options 1 and 2 are relevant

4.2.1 Update Template/Check Preview

The previous email is displayed as a template for the next email. Choose 'Edit Page' (do not choose 'Edit with Elementor').

Ignore the 'Dear....', - this will be automatically be filled-in when sending. Make the appropriate changes to the email (this will usually be a partial or complete re-write).

At the bottom of the email, enter the email subject after 'SUBJECT=...'

Click 'Update' – the email is now ready to send.

A preview of the email as seen by the recipient, can be viewed from the previous portal display.

The Administrator is not able to actually send the email, but must contact (email) StepBridgeInt and request that they send the email to the selected group.

5. SUPPORT

Members can request email support either via the website or the playing platform. Emails are sent to a Zoho mailbox, which can be accessed by the Administrator - [Zoho Email](#). Separate Administrators need to apply to StepBridgeInt for a password.

6. WEBSITE

Whilst the website is maintained by a separate webmaster, some administrators may be permitted administrative access. However knowledge of WordPress is essential. If required, access can be given by contacting the Webmaster or the Operations Manager.

7. TOURNAMENT AMENDMENTS

There are two important facilities available to the Administrator (and also to any user with status ≥ 50).

7.1 Tournament Cancellation

Occasionally a club has to cancel a pre-planned tournament. The Administrator can cancel this by:

Within the playing platform, select the tournament from the activity list. On the 'chat' line, enter:

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/TOURNAMENT CANCELTOURNAMENT
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The tournament will now be cancelled (not necessarily immediately).

7.2 Results Amendment

After a tournament has ended, the Administrator can amend a score. Join the platform, and in the 'chat' line enter:

/LOGIN STARTTOURNAMENTACTIVITY xxxx

(where 'xxxx' is the event id).

Make the necessary adjustments (if the Administrator is unfamiliar with score amendments, he should consult a StepBridgeUK TD), and then enter:

/TOURNAMENT SETTIMER <secs>

which will then exit the tournament is <secs>.

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