ACBL District 16
Contact Administration Manual

Prepared for

ACBL District 16

Prepared by

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November 9, 2023

(Revision Date: March 6, 2025)

Preface

The purpose of this manual is to document the actions required by the District 16 Contact Administrator so that when the position changes hands there is a smooth transition.

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Revision History

Date	By	Description
November 9, 2023	Evvie Gilbert – Contact Admin	Initial Version.
February 7, 2024	Evvie Gilbert – Contact Admin	Changed Contact Database section discussion. Also altered Monthly Roster Import to reflect new automation.
February 25, 2024	Evvie Gilbert – Contact Admin	Added section to Domain and Email Oversight chapter about what is needed in DNS record for the domain.
March 13, 2024	Evvie Gilbert – Contact Admin	Corrections and clarifications for the Monthly Roster Import following review with Lauri Laufman.
May 13, 2024	Evvie Gilbert – Contact Admin	Corrections to Monthly Roster Import following execution by Lauri Laufman.
July 17, 2024	Evvie Gilbert – Contact Admin	Added information for locating 0-50 masterpoint members so they can be inserted into the 0-50 Beginner Announcement list.
August 7, 2024	Evvie Gilbert – Contact Admin	Made corrections to the import instructions for the 0-50 masterpoint members.
September 7, 2024	Evvie Gilbert – Contact Admin	Added two Save Sheets to the import instructions after review with Lauri Laufman.
March 6, 2025	Evvie Gilbert – Contact Admin	Corrected a few typos and corrected the file name referenced on in step 52. The 0-50 was not in the name.

Overview

The purpose of this manual is to document the actions required by the District 16 Contact Administrator so that when the position changes hands a smooth transition occurs.

Background

ACBL District 16 (D16) communicates with its membership using emails. These communications include general information, tournament announcements, lecture series announcements and notification when a new edition of the *Scorecard* is issued.

D16 currently uses Robly which is a web-based tool to both manage the contact database and to send emails to its membership. Therefore, the steps outlined below are based on the Robly platform. If D16 ever changes its tool, those sections will need to be replaced.

Contact Administrator's Tasks

The Contact Administrator (CA) is responsible for sending out any of the needed emails as well as following up with any issues that may relate to those emails. In addition, the CA maintains the contact database monthly.

The steps required to perform these tasks are in the following sections.

Contact Database

The contact database has the following fields:

> First Name
> Last Name
> Unit
> MPs – This field is the current number of masterpoints the member has earned to date.
> Email Address
> N – This field identifies any member with less than 300 masterpoints and any other member who wants to receive the I/N Newsletter.
> Under20 – This field identifies any member with less than 20 masterpoints.
> Fifty – This field identifies any member with less than 50 masterpoints.
> 99 – This field identifies any member with less than 99 masterpoints.
> Four Ninety-nine – This field identifies any member with less than 500 masterpoints.

N, Under20, Fifty, 99 and Four Ninety-nine were originally used to create segments allowing only some members to receive certain types of emails. Since the implementation of lists, the fields are no longer used however the Robly tool does not allow them to be deleted but they are not updated or used.

Monthly Roster Import

The contact database is populated and updated by importing information received from the ACBL every month.

Around the 7th of each month, the CA receives an updated roster (as an attached.csv file named ##DMARK.csv) from the ACBL via email (d16-contactadmin@d16acbl.org). This roster contains all members of D16, their unit, address, masterpoints, and email address.

As previously stated, the Robly database has first and last name, email address, unit and masterpoints that are of interest. Each month that roster received from the ACBL has new members, members who have changed either email addresses or their units and any of the membership who are playing regularly, their masterpoints are changed. Therefore, the Robly database must be updated with this new information.

The following steps define how to import this updated information into the Robly database.

Download and Simplify the ACBL Roster

1. Download/Detach the .csv file from the email and save it in a folder on your computer. Rename the file to the current month-yyyy-acbl-number.csv.
2. Open the .csv using Excel or another similar tool.
3. Remove all but the following columns:

   ACBL Number
   First Name
   Last Name
   Masterpoints
   Unit
   Email address

   After removal of the unrequired columns, the sheet should have six (6) columns (A – F).
4. Save the sheet[1].
5. Sort the data by email address (column F) and save the sheet.
6. Remove rows whose email cell is blank, BadAddress or Confidential from the sheet.
7. Sort the sheet by ACBL Number and save the sheet. This sheet is used later to help identify new members, changed email addresses and members dropped from the roster. Save Sheet.

Prepare the Sheet for Import into Robly

8. Save current month-yyyy-acbl-number.csv as current month-yyyy.csv.
9. Remove ACBL number column and save the sheet. The sheet should have five (5) columns (A-E). Save the sheet.
10. Insert a new row at the top of the sheet and populate cells across with the following database field names:

First Name	Last Name	MPs	Unit	Email Address

11. Save and close the sheet.

Import the Roster

12. Log into Robly (using an administrator login).
13. Click Audience.
14. Click Manage Contacts.
15. Click Import Contacts.
16. Click Select Files. A dialog box pops up. Navigate to where you saved the current month-yyyy.csv file created in step 8. Click the file name and click Open.
17. Make sure Add Contacts is highlighted in blue and click Next Step.
18. Click agree to Opt-In Certification and click Import Contacts.

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[1] All the .csv sheets saved in any of the steps should be Comma Delimited csv files only.

19. This brings up Review your data page that should show the first row of data in the current month-yyyy.csv. Make sure that they are the same. If not cancel and go back to the start to figure out why not. Otherwise, scroll down and click FINISH IMPORT. Current member information such as masterpoints total and unit are updated. New members or members with changed emails are also inserted. Click CLOSE.

Prepare Comparison Workbook

The Comparison Workbook is used to locate new members, members whose email addresses or units are changed, those who have been dropped from the roster and new 0-50 masterpoint members.

20. Copy the previous month's comparison.xlsx file to the folder where you started at step 1.
21. Rename that file to comparison-previous month-yyyy-current month-yyyy.xlsx.
    e.g.;
    If the current month is March, the comparison file would be named comparison-jan-2024-feb-2024.xlxs. After copying that file, it would be renamed to comparison-feb-2024-mar-2024.xlxs.

22. Open the comparison-previous month-yyyy-current month-yyyy.xlxs in Excel. This workbook has Seven (7) worksheets: Old, New, OldZerotoFifty, NewZerotoFifty, Find Add-ChangedZerotoFifty, Find Add-Changed and FindDrop.
23. Clear contents of Old and copy New worksheet. Paste into Old worksheet.
24. Clear contents of New.
25. If you closed current month-yyyy-acbl-number.csv, reopen it and copy it.
26. Paste that information into New.
27. Clear the contents of OldZerotoFifty and copy NewZerotoFifty worksheet. Paste into OldZerotoFifty.
28. Clear the contents of NewZerotoFifty.
29. Copy New to NewZerotoFifty.
30. Sort NewZerotoFifty by masterpoints (Column D). Remove all rows where the masterpoints are greater than 50. Save Sheet.
31. Clear columns A through F in Find Add-ChangedZerotoFifty being care careful *not to clear the formulas* in columns G and H.
32. Clear columns A through F in Find Add-Changed being careful *not to clear the formulas* in columns G and H.
33. Clear columns A through F in FindDrop being careful *not to clear the formula* in G. Save the workbook. Save sheet.

Locate New Members, Changed Emails

34. Copy columns A through F from **New** to Find Add-Changed being careful *not to overwrite* the formulas in columns G and H.
35. Scroll to the bottom of Find Add-Changed and if there are rows with values in F but no values in G (i.e., there are more entries this month than the previous month), copy the formulas from the last row of G and H and paste them into the new rows. Save the workbook.

Locate New Members, Changed Emails for the 0-50 Masterpoint Members

36. Copy columns A through F from **NewZerotoFifty** to Find Add-ChangedZerotoFifty being careful *not to overwrite* the formulas in columns G and H.
37. Scroll to the bottom of Find Add-ChangedZerotoFifty and if there are rows with values in F but no values in G (i.e., there are more entries this month than the previous month), copy the formulas from the last row of G and H and paste them into the new rows. Save the workbook.

Locate Dropped Members

38. Copy columns A though F from **Old** to FindDrop being careful *not to overwrite* the formula in column G.
39. Scroll to the bottom of FindDrop and if there are rows with values in F but no values in G (i.e., there are more entries than the last month), copy the formula from the last row G and paste into the new rows. Save the workbook.

Make sure the Changed Emails (old) are Deleted from the Database

40. Copy FindAdd-Changed into a new spreadsheet named current month-yyyy-changed.csv. Sort the sheet by column H. Delete all rows that do not have changed in their H cell. Save the sheet.
41. Log into Robly if you previously logged out.
42. Click Audience.
43. Click Contacts.
44. Make sure you are looking at All Contacts. Using the current month-yyyy-changed.csv, for each changed email (Column G), delete it if it is subscribed. You must click the three dots to the right side of the row to bring up the menu so you can see. Close current month-yyyy-changed.csv.

Prepare New Member and Changed Email Sheet

45. Copy FindAdd-Changed into a new spreadsheet named current month-yyyy-newmembers.csv. Sort the sheet by column H. Delete all rows that are not Add or Changed and save the sheet.
46. Delete column G, H, A and C and save the sheet. You must delete *in the order listed* because of the formulas in G and H.
47. Insert a new row at the top of the sheet and populate the cells across with the following database fields:

First Name	Last Name	Unit	Email Address

48. Save and close current month-yyyy-newmbmers.csv.

Prepare New Member and Changed Email Sheet for the 0-50 Masterpoint members

49. Copy FindAdd-ChangedZerotoFifty into a new spreadsheet named current month-yyyy-newmembers-0-50.csv. Sort the sheet by column H. Delete all rows that are not Add or Changed and save the sheet.
50. Delete column G, H, A and C and save the sheet. You must delete *in the order listed* because of the formulas in G and H.
51. Insert a new row at the top of the sheet and populate the cells across with the following database fields:

First Name	Last Name	Unit	Email Address

52. Save and close current month-yyyy-newmbmers-0-50.csv.

Import the New Members and Changed Emails into Lists

53. It is now time to put the new members into Robly lists. In Robly, Click Audience.
54. Click Manage Contacts.
55. Click Import Contacts.
56. Click Select Files. A dialog box pops up. Navigate to where you saved the current month-yyyy-newmembers.csv file created above. Click the file name and click Open.
57. Make sure Add Contact is highlighted in blue.
58. Click Add contact to lists. This brings up a dialog box and check the following lists:
General Announcements
Tournament Announcements
Scorecard
I-N Newsletter
English Lecture Series
Spanish Lecture Series
Unit 174 Newsletter
Unit 174 Events-Classes Newsletter
59. Scroll down and click Next Step.
60. Click agree to Opt-In Certification and click Import Contacts.
61. This brings up Review your data page. Scroll down and click FINISH IMPORT. Click Close.

Import the New Members and Changed Emails into 0-50 Beginner Announcements list

62. It is now time to put the new 0-50 members into Robly list. In Robly, Click Audience.
63. Click Manage Contacts.
64. Click Import Contacts.
65. Click Select Files. A dialog box pops up. Navigate to where you saved the current month-yyyy-newmembers-0-50.csv file created above. Click the file name and click Open.
66. Make sure Add Contact is highlighted in blue.
67. Click Add contact to lists. This brings up a dialog box and check the following list:
0-50 Beginner Announcements
68. Scroll down and click Next Step.
69. Click agree to Opt-In Certification and click Import Contacts.
70. This brings up Review your data page. Scroll down and click FINISH IMPORT. Click Close.
71. Close your Excel (or other tool) files.

Remove Deceased Members from Database

ACBL emails a .txt file at the beginning of each month (DECEASEDMM.txt) that identifies the district member(s) who died. These members must be deleted from the database if they are subscribed. If they are unsubscribed, no action is needed.

72. Click Audience.
73. Click Contacts and make sure you are looking at All Contacts.
74. Using the advanced search option, locate each member in deceasedmm.txt file and delete (click on the three dots on the right) them if they are subscribed.
75. Log out of Robly.

Pass the Current Month Roster Files

76. Email all the current month files (.txt, csv and .xlsx) to Backup Contact Administrator at d16contactadmin-backup@d16acbl.org.
77. Email the ##DMARK.csv to the District 16 president.
78. Start at Step one next month!

Lecture Series

D16 offers two free lectures each month: Spanish and English (Beginner/Intermediate). Two announcements must be sent to the membership for each lecture. The first announcement is issued a week before the lecture and the next is issued the day before the lecture. The CA must remind the D16 lecture coordinators to obtain the information to include in the emails as well as prepare and schedule emails to be sent to the membership for these series.

Spanish Lecture

The Spanish Lecture is held on the 3rd Saturday each month. The first email should be sent on the 2nd Saturday of each month. The second email is sent the following Friday (the day before the lecture). This email is in Spanish so if you do not know the language, it must be provided to you in Spanish.

English Lecture (Beginner/Intermediate)

The English Lecture is held on the 4th Saturday each month. The first email should be sent on the 3rd Sunday of each month. The second email is sent the following Friday (the day before the lecture).

Email Preparation using Robly

The lecture series uses ZOOM and the meeting information for them is setup and does not change from month-to-month. The easiest way to create the emails is to start with one from the previous month. The following steps define how to create and schedule the emails:

1. Send your email reminders to the Lecture Series coordinator(s).
2. Once you have obtained the information, log into Robly (using an administrator login)
3. Click Email.
4. Click Campaigns.
5. Locate the previous month's email for the lecture.
6. Click on the three vertical dots to the right of the campaign to bring up a dialog box.
7. Click on Copy As.
8. Click Classic and then Next.
9. Remove copy from the name of the campaign and click copy.
10. Go back to page 1 of Campaigns. Your campaign should be the first listed as a draft.
11. Click on its name (should include One Week Away! at the end of the campaign name).
12. Click EDIT DESIGN.
13. The headers and the lecture content must be changed. Do NOT alter the ZOOM information or change its link.
14. Once you have saved and returned to the campaign you are ready to send a test to yourself.
15. Scroll down and click on Send Test. Put any email address to which you want the test to be sent.
16. Once you receive the test email, make sure you have no errors and also make sure to click on the ZOOM link to make sure it works.
17. Log back into Robly if you had logged out.

18. Click on your campaign.
19. Scroll down to Sending Options and unclick the I don't need these options.
20. Click on EDIT SENDING OPTIONS.
21. Click YES to Schedule Campaign.
22. Specify the date and time the campaign should be sent.
23. None of the other options should be changed from NO.
24. Scroll down and click Save Options.
25. Click Schedule now.
26. Click on the three vertical dots to the right of the campaign to bring up a dialog box.
27. Click Copy As.
28. Click Classic and then Next.
29. Remove One Week Away! – copy and put Tomorrow!
30. Click Copy.
31. Click on the Tomorrow campaign.
32. Click Content and remove Una Semana de Distancia! or One Week Away!. Replace with Mañana or Tomorrow.
33. Click Save Subject.
34. Repeat Steps 14-25 for the Tomorrow campaign.

Domain and Email Oversight

D16 uses JustHost.com to host the d16acbl.org domain. It also uses Gmail for some of the positional emails since those were set up before the domain became available. The following sections describe the emails. followed by information about the domain's DNS records.

JustHost Emails

JustHost allows D16 several "free" email accounts. These emails define standard positions within D16 and can be used to relay (forward) any received emails to the current position's used email. The following email accounts are:

D16-President@d16acbl.org – Forwarded or used by to the current D16 president's email.

D16-ContactAdmin@d16acbl.org – Forwarded to D16Robly.boss@gmail.com
D16-ContactAdmin-Backup@d16acbl.org – Forwarded to the current CA backup.
D16-Webmaster@d16acbl.org – Forwarded to the current d16 webmaster.
D16-ScorecardEditor@d16acbl.org – Forwarded to D16EditorScorecard@gmail.com
D16-I-N-Newsletter@d16acbl.org – Forwarded to innewsletter@gmail.com
Unit174-Newsletter@d16acbl.org – Forwarded to Unit174News@gmail.com
Unit174-Events-and-ClassesNewsletter@d16acbl.org – Not currently set up.

When a position changes hands, the CA must log into the JustHost email account and change the forwarded email. When the president changes, the current president should give the new president the account's password.

The CA should log in periodically to delete old emails from each. It is unknown how much disk space JustHost allows for each email address so the forwarded emails should be deleted at least every couple of months. As time passes and the district starts using these emails more and our membership becomes accustomed to using the "generic" addresses, the frequency of this task may need to be altered and the JustHost subscription altered.

Gmail Emails

D16 standard gmail accounts are:

D16Robly.boss@gmail.com – Used to send/receive emails by the CA. This address is also used to log into Robly by the CA.
D16EditorScorecard@gmail.com – Used by the current Scorecard editor.

The CA's only task with respect to two emails is to know the passwords to the gmail accounts so that when the position changes, it can be passed to the next volunteer.

Innewsletter@gmail.com – Used by the I/N newsletter editor.

This email address was set up such that it is really owned by the D16Robly.boss@gmail.com address so that when that email address must be passed to the next volunteer, knowing how to log into this gmail account is only needed.

Domain DNS Records

This section is included in this manual because if the district ever decides to alter its domain, the contact administrator must understand and make sure that certain records in DNS get setup to ensure email delivery.

Because the d16acbl.org domain is not only used to host the district's website but also as the domain from which the district's emails are sent (currently via Robly), it is important to understand aspects of what comprises the DNS records associated with the domain.

Domain Name System (DNS)

DNS allows people to connect to a website by its name instead of its IP (Internet Protcol) address. An old analogy would be the use of a phone book to look up someone's address and phone number. So, the DNS allows someone to look up a name and retrieve the IP address (address and phone number). Every name has its own unique IP address. Every device connected to the internet has its own unique IP address.

DNS are resolved by converting the hostname such as d16acbl.org to an IP address (173.254.29.129). That sentence is an oversimplification since there are many steps along the way but in the end, it boils down to locating the unique IP address.

DKIM, SPF & DMARC Records for Email

These TXT records contained in the DNS help authenticate email senders by verifying the emails came from the actual domain – d16acbl.org. This is important to prevent spam, phishing attacks and other security threats. In addition, as of February 2024 these records are a regulation so if not present, many if not most emails using, in particular, yahoo.com, gmail.com and aol.com will not be delivered.

Domain Keys Identified Mail (DKIM) and Sender Policy Framework (SPF) identify *who* is sending the email. Think of them as the passport or driver's license for the domain.

Domain-based Message Authentication Reporting and Conformance (DMARC) tells mail servers *what* to do when the DKIM or SPF fail such as marking the email as spam, delivering it anyway or dropping the email altogether.

So, how do each of these records work when emails are sent?

- DKIM (DomainKeys Idenfified Mail)
  Allows a domain owner to "sign" emails from their domain. The DKIM signature is digital and uses cryptography to mathematically verify that email came from the domain (d16adbl.org). It uses public key cryptography. The DKIM record stores the domain's public key and mail servers using this public key, decrypt the encrypted message header and compare that to the unencrypted message header. If they do not match, the receiving email server knows the email did not originate from d16acbl.org. receiving emails. The DKIM record is:

  dkim._domainkey.d16acbl.org   k=rsa;
  p=MIGfMA0GCSqGSIb3DQEBAQUAA4GNADCBiQKBgQC7khR9li7Pu9oK0SonBhkMaqoqy
  LGWDPu4H171EgllxGNJ97zshj69m88BT43Rf5t0nQIy8er13PkRAWJJRIlek8Pu05I8GueiMgbea
  AS8jg/sWSYzSMm6251c3ZFfV3tL/MUPPDbO0NvC9+mG2+OFRiyyrrlYfRV3F0U/XcBdhwID
  AQAB

- SPF (Sender Policy Framework)
  Allows a domain to list all the IP addresses of the servers from which an email can be sent. Mail servers check against the SPF record before passing any emails to a recipient's inbox. The SPF record using Robly as our email tool should be:

  v=spf1 a mx include:_spf.robly.com -all;

- DMARC (Domain-Based Message Authentication, Reporting & Conformance)
  Tells the receiving mail server what to do after checking the DKIM and SPF so it sets the domain's policy. This policy can tell the mail servers to quarantine emails that fail either one or both the DKIM and SPF, reject the emails or deliver them anyway. The DMARC record should be:

  v=DMARC1; p=quarantine;

Contact Administrator Transition

Periodically, the person doing the contact administration may change hands. When this happens, the current administrator must pass email addresses/passwords to the new volunteer.

Robly Login

After passing the email accounts, the current volunteer must use d16robly.boss@gmail.com as the username for the Robly login and select the forgot password option. An email will come from Robly with a link to allow that user to create a new password. Since that new volunteer will be logging in from a different IP address, Robly will send an additional email with a code. Make sure to check the box telling Robly to remember your device. After logging into Robly, go to manage contacts and edit D16Robly.Boss@gmail.com and remove the previous administrator's name and insert your name.