



Membership Upgrade Discounts

User Guide for JustGo

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Purpose of this Guide



After a member takes out membership, there may be a need part way through the year to upgrade to a new membership (e.g. Non-Riding to Riding Membership).

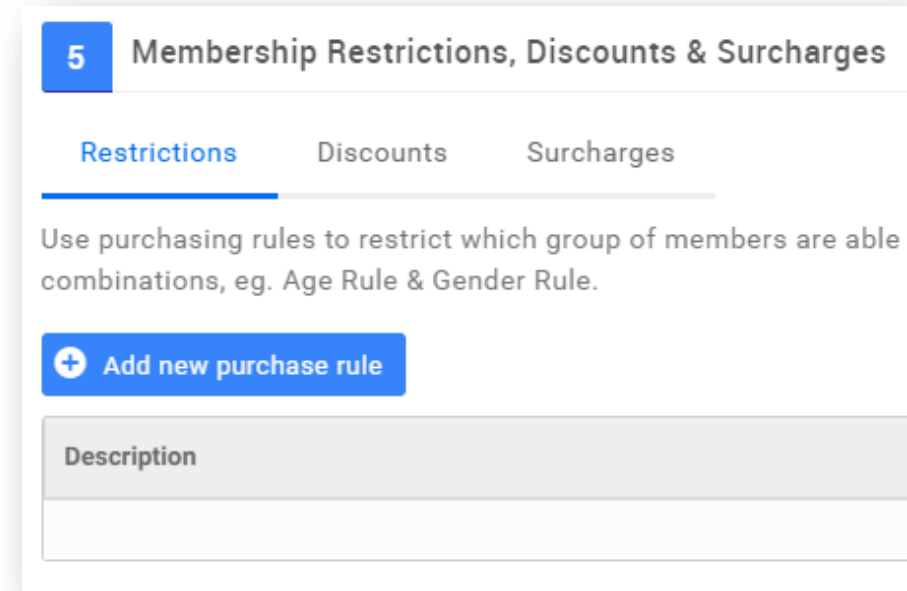
This guide explains how you can apply discount rules so a member only pays the difference between the old membership and new membership. For example if the original membership is \$200 and the upgraded membership is \$250, to allow the member to pay \$50.

This is facilitated through Smart discount rules. This guide explains how to set this up.

How do I apply Smart Rules to a Membership?

When configuring a membership in the Membership Management tile, the smart rules can be applied under the “Membership Restrictions, Discounts & Surcharges” section. Usually section 5.

For an upgrade, you may want to apply a discount. This is completed by adding a Discount rule using the Discounts tab.



What is a Rule Group?

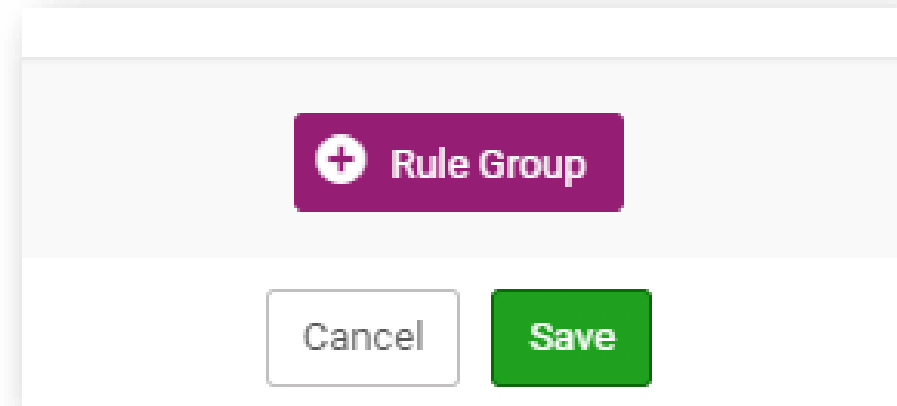
Rule groups are a way to add multiple conditions in the same rule.

Rules within the same group will apply an AND condition.

Rules in separate groups will apply an OR condition.

For example, if a 10% discount is to be applied for members under 18 or over 60, you will need to apply two groups containing the different age rules.

For an upgrade this may only be needed if different values are required based on a particular time period (e.g. 3 months left on the membership)

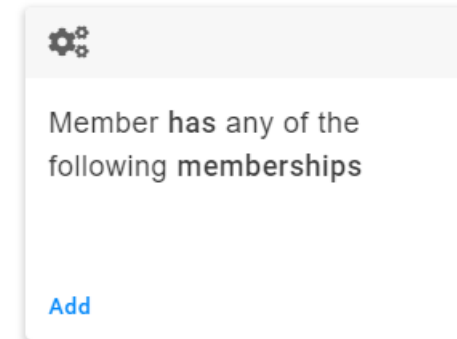


Which is the main rule needed?



“Member has any of the following memberships” is the primary membership for applying a discount for an upgrade.

This lists the eligible memberships that can be upgraded from and what discount will therefore be applied.



What does the rule set-up look like?



This rule specifies the discount amount and lists all the eligible memberships for that discount price.

If different upgrade memberships warrant different discounts then further groups of rules can be applied.

[+ Add new discount rule](#)

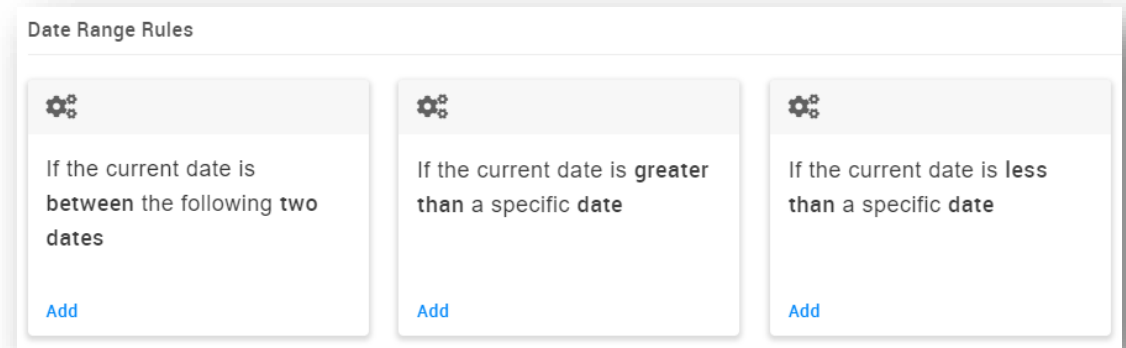
Description	Active
<p>Discount Rule Description: Upgrade</p> <p>Amount: <input type="text" value="63.50"/> Is %: <input type="checkbox"/> Explanation: <input type="text" value="Upgrade"/></p> <p>Discount Rule Group will be SATISFIED if the following conditions are met</p> <p>+ Member has any of the following memberships <input type="text" value="Adult Riding Member,Senior Riding Meml"/> <input checked="" type="checkbox"/> Include cart checking ? ×</p> <p>+ Add another rule + Add New Rule</p>	<p>Active: <input checked="" type="checkbox"/></p> <p>REMOVE GROUP</p> <p>+ Rule Group</p> <p><input type="button" value="Cancel"/> <input type="button" value="Save"/></p>

When might a Date Range Rule be used?



These rules are applied if you wanted to discount different values throughout the year. For example, with an upgrade happening only 2 months in, the full value of the original membership may be required, but if the upgrade happens 6 months in then maybe only a portion of the original value is discounted.

Date rules enable you to combine with the “Has Membership” rule to enable this.



Will the original membership expire?



The original membership does not expire automatically when an upgrade occurs.

JustGo allows the membership to run its course until the following year's renewal at which time the member can decide which membership to renew.

This provides easy visibility that an upgrade has occurred.

Need further assistance?



If you require further assistance then please contact support@ponyclubaustralia.com.au