



Finance Management

User Guide for JustGo

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What is the Finances feature?



The Finance feature in the JustGo system allows all users at each level of the system hierarchy to have a full overview of their payment info and history.

Note: Each level of the hierarchy will only see what is relevant to them. A member will only see their own financial records.

Some screenshots and info in this guide may differ depending on subscription type.

How do I access Finances?

Once you are logged in, the Finance tile will be found in the administration area of your Menu.



Subscription Summary



Administrators can review their member's **Subscription Summary**, add a new subscription using the **Add Schedule** button and view more details of an individual's subscriptions through the **View Plans** button. You can also cancel payment plans, change card details, bank details or switch to a different payment method all on behalf of the member.

Name	Email Address	No. of Plans	
Roy Miller (ME000002)	Roymiller@azolve.com	1	View Plans

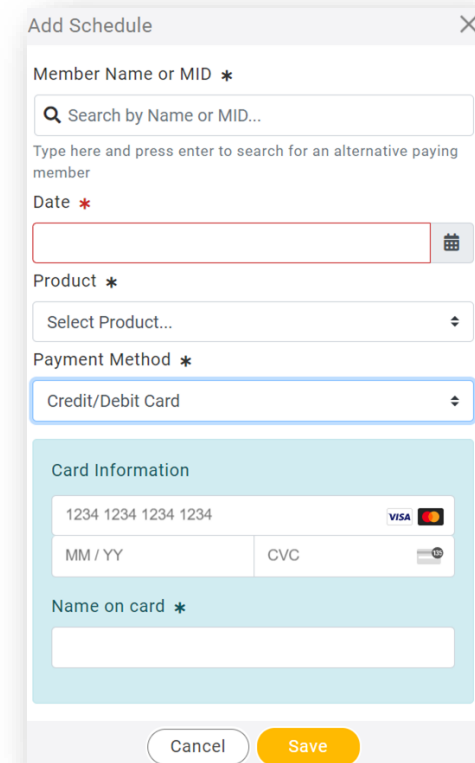
Only available for JustGo Enterprise and JustGo Pro.

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Subscription Summary

To add a new payment schedule for a member simply select the Add Schedule button and a popup will appear.

Enter the member name or MID, Date, Product, Payment Method and members card information.



The screenshot shows a modal window titled "Add Schedule" with a close button (X) in the top right corner. The form contains the following fields and sections:

- Member Name or MID ***: A search input field with a magnifying glass icon and the placeholder text "Search by Name or MID...". Below it, a note says "Type here and press enter to search for an alternative paying member".
- Date ***: A date input field with a calendar icon on the right.
- Product ***: A dropdown menu with the placeholder text "Select Product...".
- Payment Method ***: A dropdown menu with "Credit/Debit Card" selected.
- Card Information** (light blue background):
 - Card number: "1234 1234 1234 1234" with a VISA logo.
 - Expiration: "MM / YY" and "CVC" with a CVC icon.
 - Name on card: An empty text input field.
- Buttons**: "Cancel" and "Save" buttons at the bottom.

Only available for JustGo Enterprise and JustGo Pro.

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Subscription Summary



To update members card details simply select the View Plan button and click on **Update Card Details**. You can also change members payment method to direct debit by using the **Switch to Direct Debit** button, or simply **Add Subscription Item** to a members profile. You can also cancel the subscription plan and view the **Payment Schedule** for that member.

← Schedule Plans

The following information is showing for:

Koby Swallow (TA000001)
KobySwallow2213@teleworm.us

Payment Owner : Koby Swallow
Payment Type : Credit/Debit Card
Brand : visa
Expiry : 4/2024
Last 4 digits : ****4242

Subscription Plan - Every 1 Year Active
Next Payment Date : 30/06/2021

Standard Adult

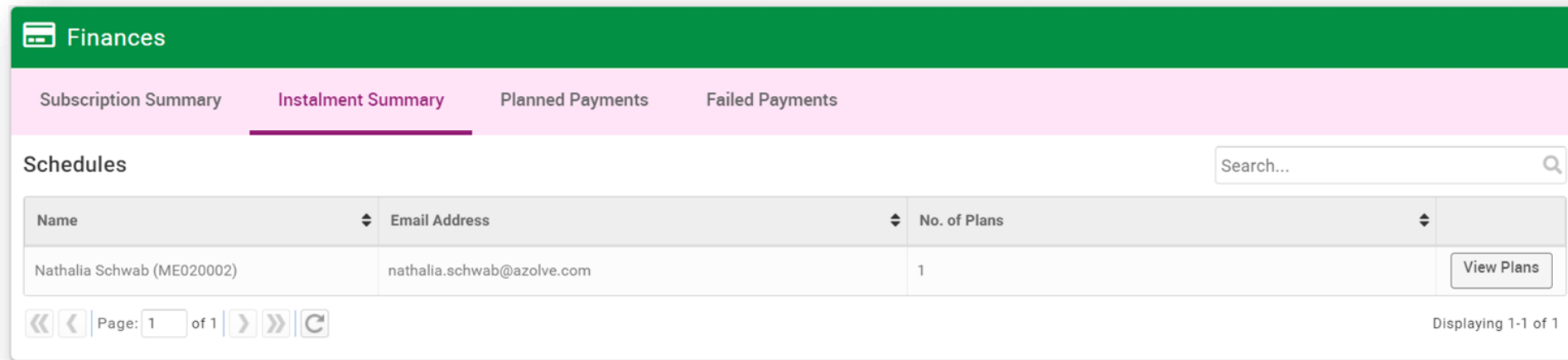
Update Card Details Switch to Direct Debit + Add Subscription Item

Cancel Plan Payment schedule

Only available for JustGo Enterprise and JustGo Pro.

Instalment Summary

Instalment Summary shows all the active instalments for members within the system. You can also use the **View Plans** button, similarly to Subscription Summary.



Finances

Subscription Summary **Instalment Summary** Planned Payments Failed Payments

Schedules

Name	Email Address	No. of Plans	
Nathalia Schwab (ME020002)	nathalia.schwab@azolve.com	1	View Plans

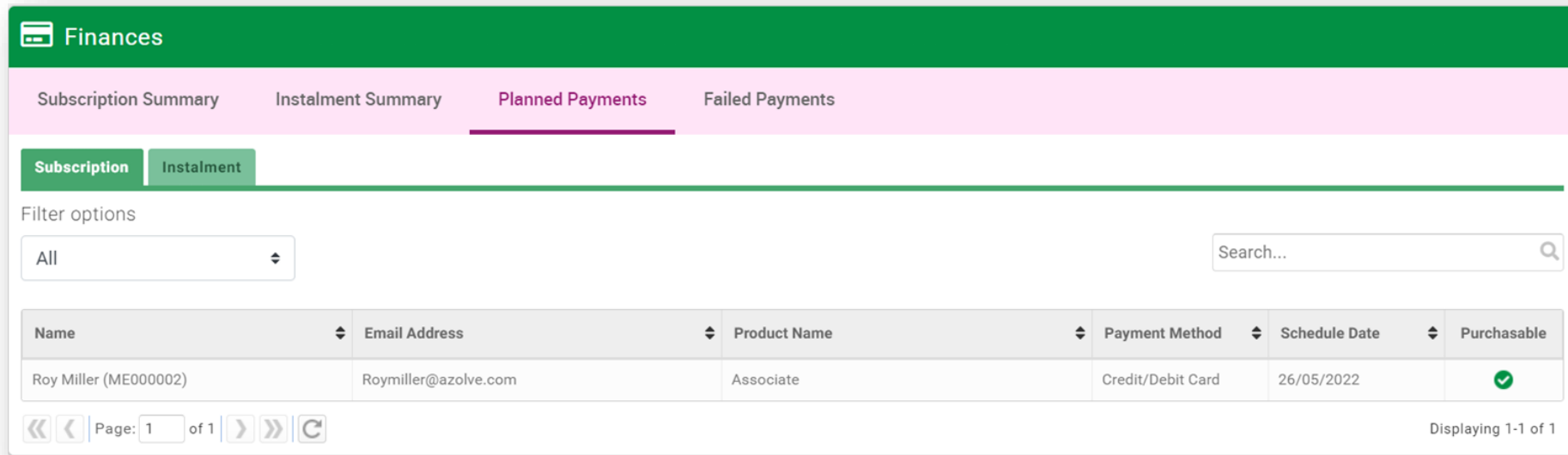
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Only available for JustGo Enterprise and JustGo Pro.

Planned Payments

Planned Payments shows you all the upcoming payments pending for members within the system. You can now search Subscriptions and Instalments. You can also use the filter options to view past payments, or payments due in the next 7, 15 or 30 days.



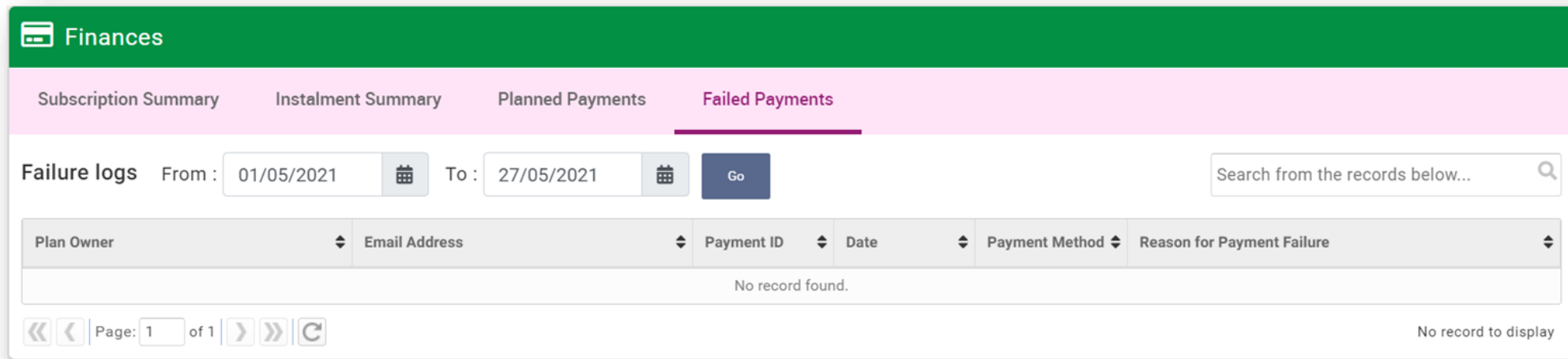
The screenshot displays the 'Finances' section of the JustGo interface. The 'Planned Payments' tab is selected, showing a table of upcoming payments. The table has columns for Name, Email Address, Product Name, Payment Method, Schedule Date, and Purchasable. A single entry is visible for Roy Miller (ME000002) with a schedule date of 26/05/2022 and a green checkmark indicating it is purchasable. The interface includes filter options, a search bar, and pagination controls.

Name	Email Address	Product Name	Payment Method	Schedule Date	Purchasable
Roy Miller (ME000002)	Roymiller@azolve.com	Associate	Credit/Debit Card	26/05/2022	✓

Only available for JustGo Enterprise and JustGo Pro.

Failed Payments

Failed Payments shows any failed instalment or subscription payments. You can also search by a specific date or by entering a date range, you will be able to see the reason for failed payments and take any action required.



The screenshot shows the 'Finances' section of the JustGo interface. The 'Failed Payments' tab is selected. The 'Failure logs' section includes a date range filter from '01/05/2021' to '27/05/2021' and a search bar. The table below has columns for Plan Owner, Email Address, Payment ID, Date, Payment Method, and Reason for Payment Failure. The table is currently empty, displaying 'No record found.' and 'No record to display' at the bottom.

Plan Owner	Email Address	Payment ID	Date	Payment Method	Reason for Payment Failure
No record found.					