



Smart Rules

User Guide for JustGo

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What are Smart Rules?

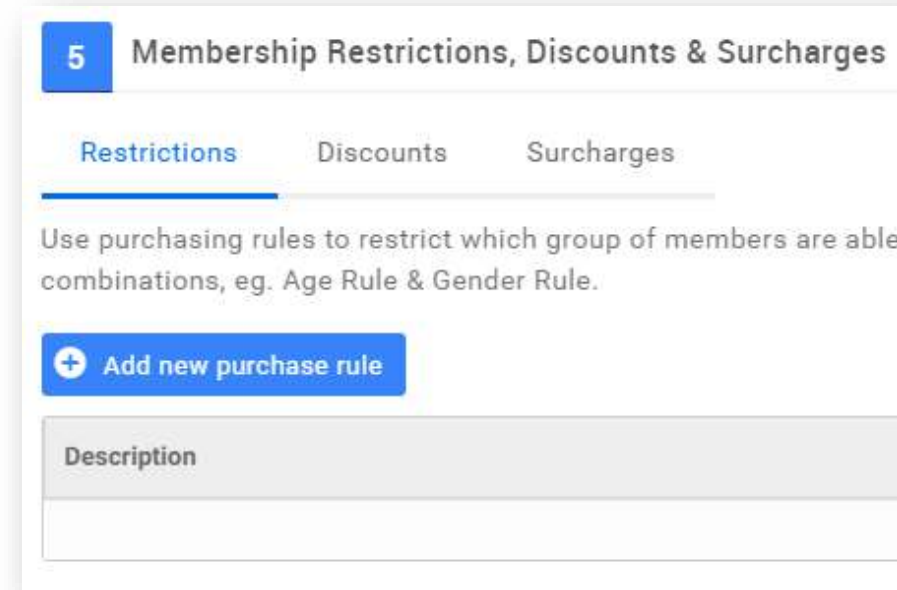


Smart rules are a way for Administrators to apply purchase restrictions, discounts and surcharges to memberships and event tickets automatically.

Some screenshots and info in this guide may differ depending on your subscription type, JustGo Essential or JustGo Pro.

How do I apply Smart Rules to a Membership?

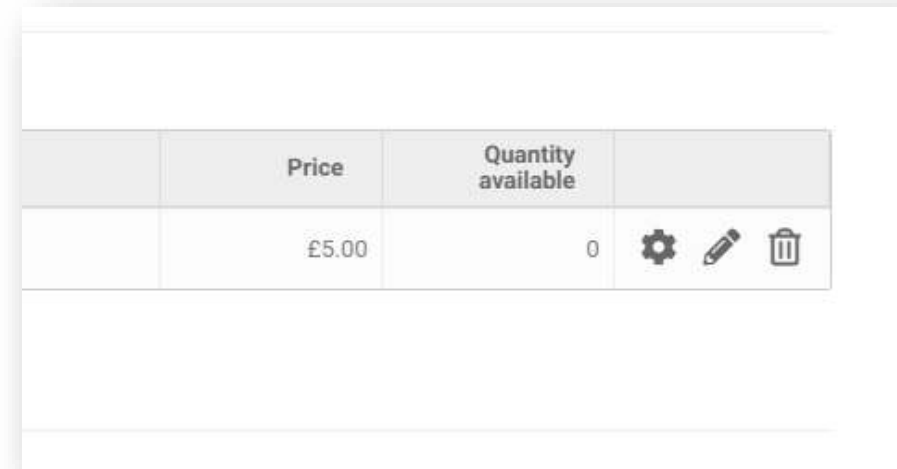
When configuring a membership in the Membership Management tile, the smart rules can be applied under the “Membership Restrictions, Discounts & Surcharges” section. Usually section 5.






How do I apply Smart Rules to an event ticket?

When configuring an event in the Event Management tile, the smart rules can be applied under the Advanced Settings of the ticket.

Note: You will have to set the basic ticket details and select the green tick to confirm the ticket before the settings icon is available.



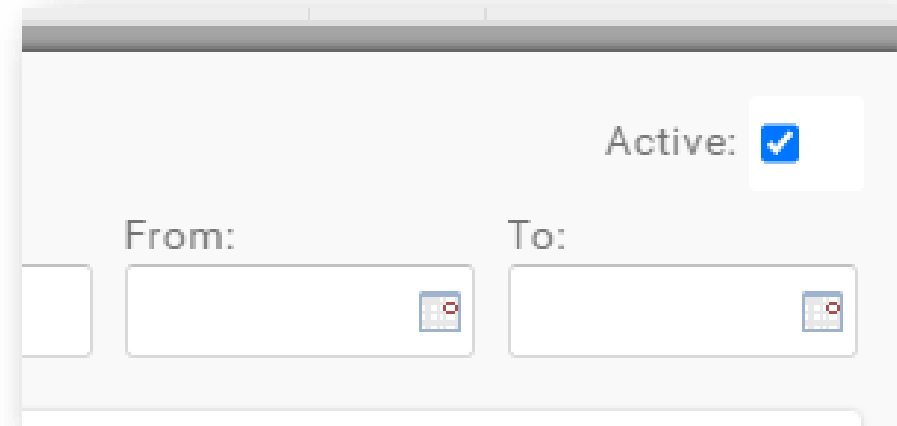
	Price	Quantity available	
	£5.00	0	  

Only available for JustGo Enterprise and JustGo Pro.

Can a rule start or stop working on a specific date?

You can set From and To dates for every rule to determine when the rule should be active and expire.

This can be particularly useful to offer an early bird discount without having to offer two different ticket types.



The screenshot shows a configuration window for a rule. At the top right, there is a label 'Active:' followed by a blue checkmark icon. Below this, there are two date selection fields. The first field is labeled 'From:' and the second is labeled 'To:'. Each field has a calendar icon to its right. To the left of the 'From:' field, there is a small, empty square box.

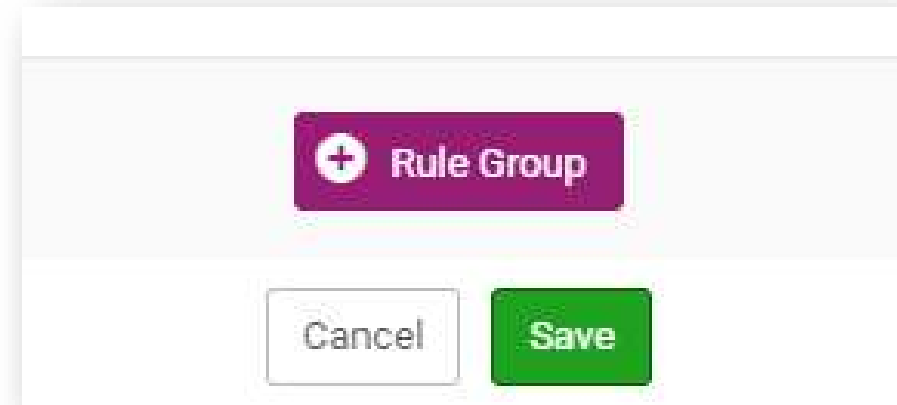
What is a Rule Group?

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

Rules within the same group will apply an AND condition.

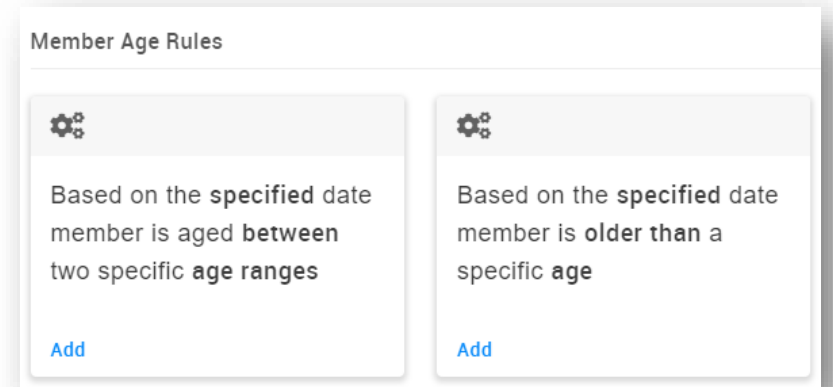
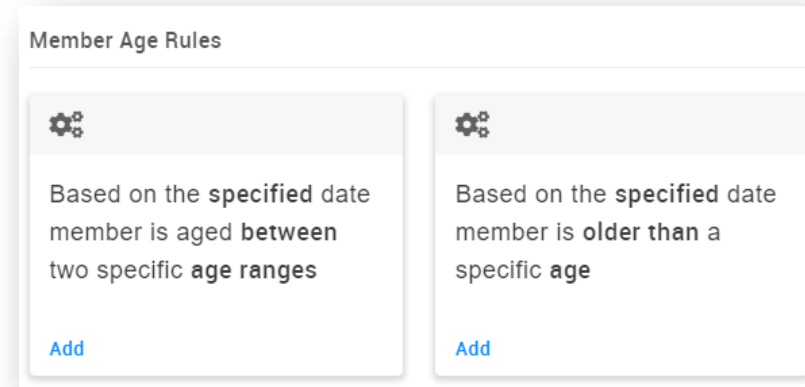
Rules in separate groups will apply an OR condition.

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.



What are Member Age Rules?

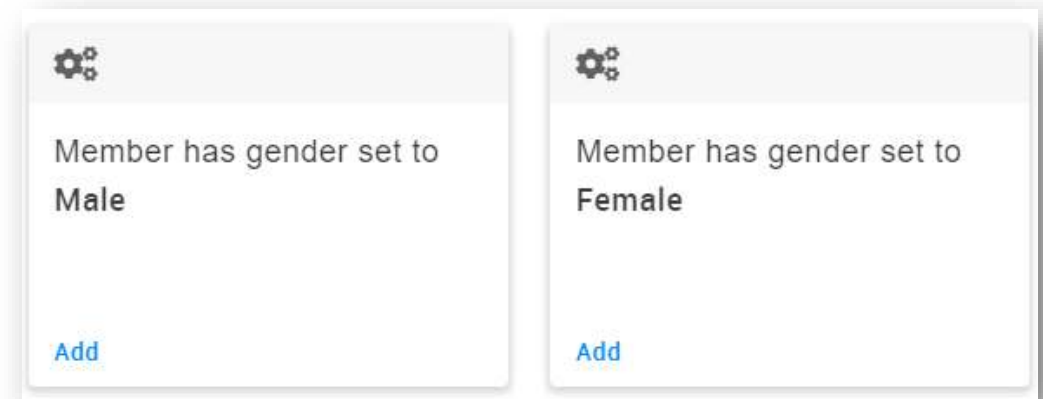
These rules refer to the age of the member. For example, if a membership is restricted for only those over 18, the “Based on the specified date, member is older than a specific age” rule can be used.



What are Member/Club Profile Rules?

Member/Club profile rules are rules that can be created against certain fields within the member/club profiles.

By default Male and Female rules will be available in the member profile. It is possible to add additional gender options. This will then reveal additional rules to accommodate.

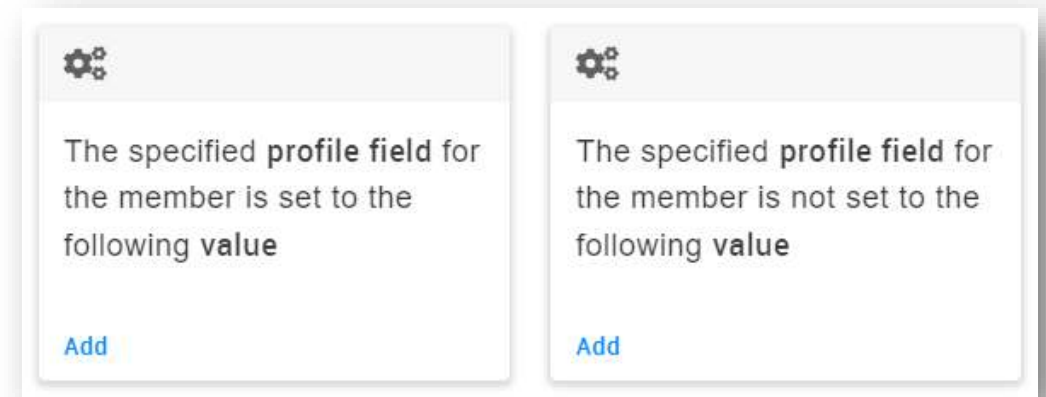


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What are Member/Club Profile Rules?

The rules shown in the screenshot are set based on the fields created in the Field Management tile.

For example, you can configure a field for students and apply a discount for the members who have answered yes.



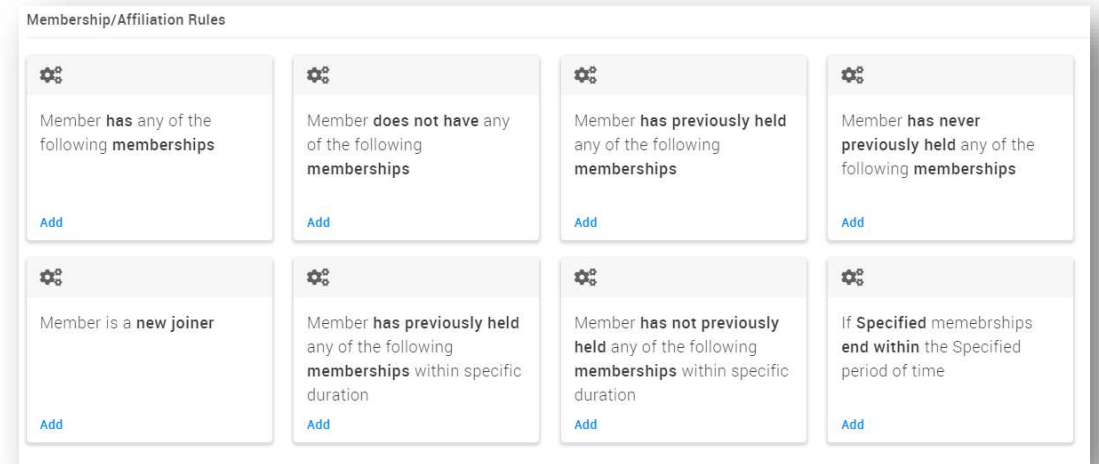
If you have JustGo Essential, only the JustGo standard fields will be available for you. With JustGo Pro, you can create a new field to add a specific rule.

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What are Membership/Affiliation Rules?

These rules are set based on the memberships/club affiliations held by the member/club.

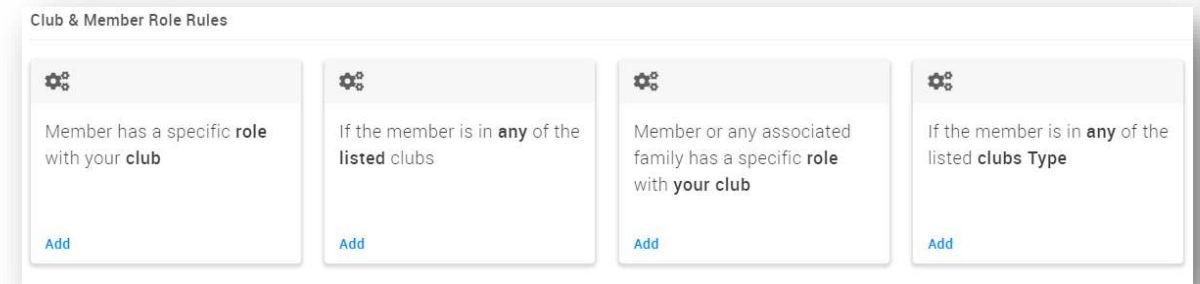
For example, the “New Joiner” rule can be used to provide a discount for members who have never held a membership before and are joining for the first time.



What are Club & Member Role Rules?

These rules are set based on the members role or association with a club.

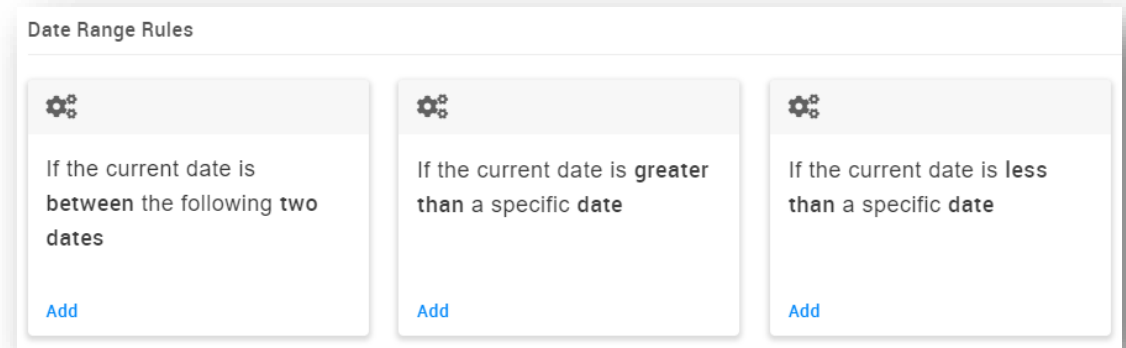
For example, an event ticket can be restricted only for members who are part of a club using the ‘member is in any of the listed clubs’ rule.



What are Date Range Rules?

These rules are applied based on the date of the membership or event ticket purchase.

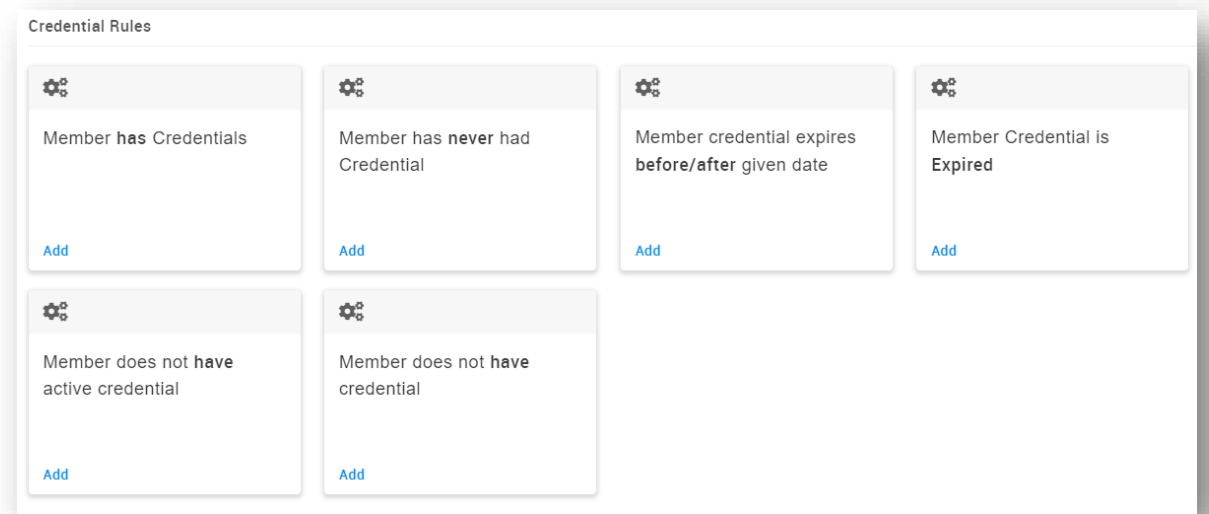
For example, an early bird discount can be applied using these rules.



What are Credential Rules?

These rules refer to the credentials a member has active against their profile.

For example, a discount can be offered to Coaches who are taking a particular course as a refresher by applying the rule 'member has credentials'. This may be an active first aid certificate that they are reapplying for in advance of its expiry.

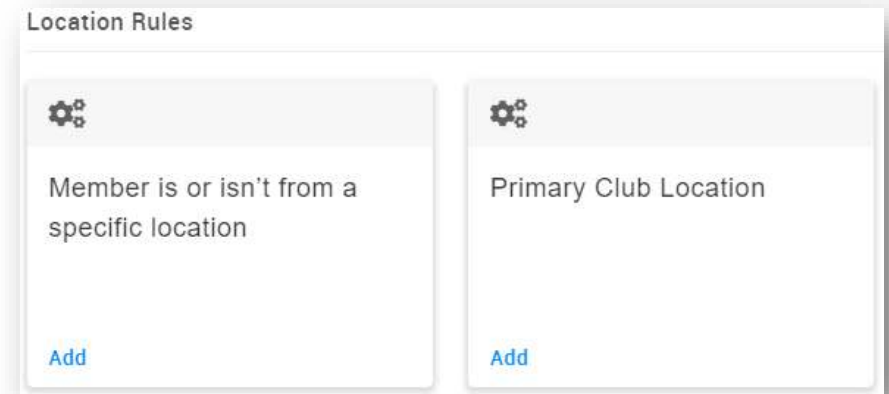


What are Location Rules?



These rules refer to the member's or the member's primary club's location.

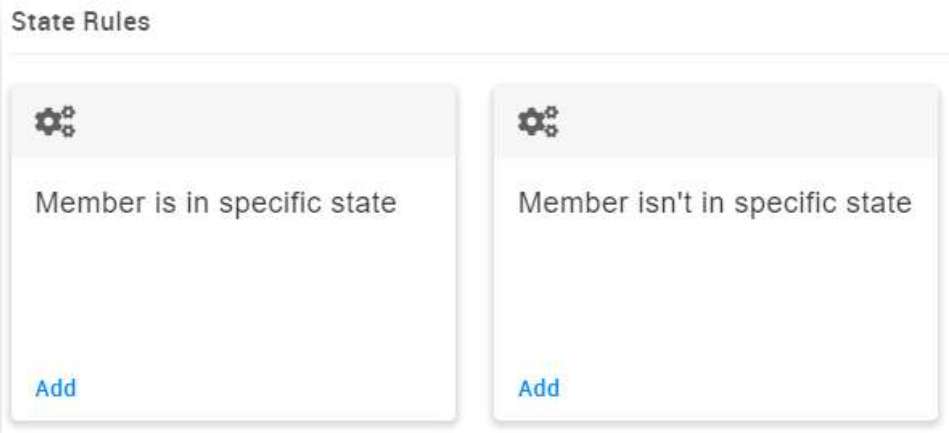
For example, a non-resident membership can be restricted to members who are from outside of the country.



What are State Rules?

These rules refer to the status of the member record, visible from the Members tile.

For example, an additional fee can be charged for members who are inactive.

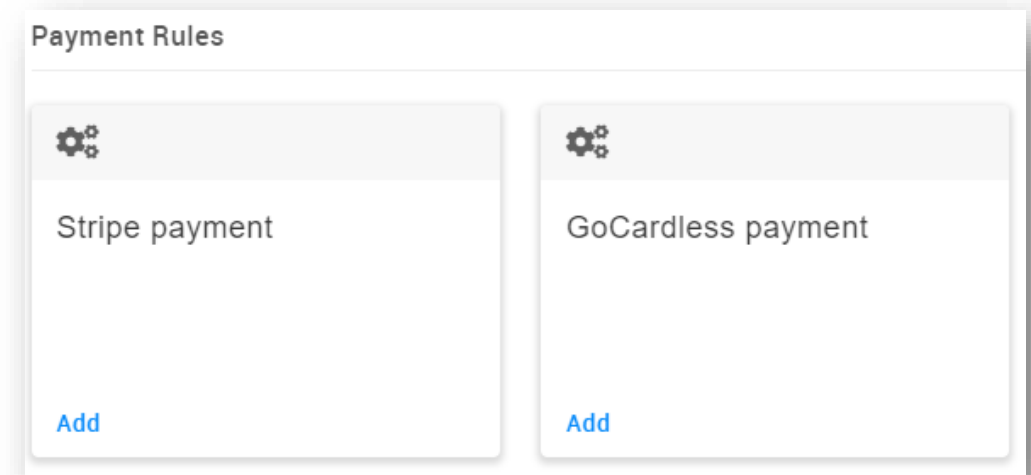


What are Payment Rules?

These rules refer to the method of payment chosen in the cart. Stripe refers to Credit/Debit cards, whilst GoCardless refers to Paying via Bank.

For example, you are able to collect a 2% surcharge to cover card processing fees.

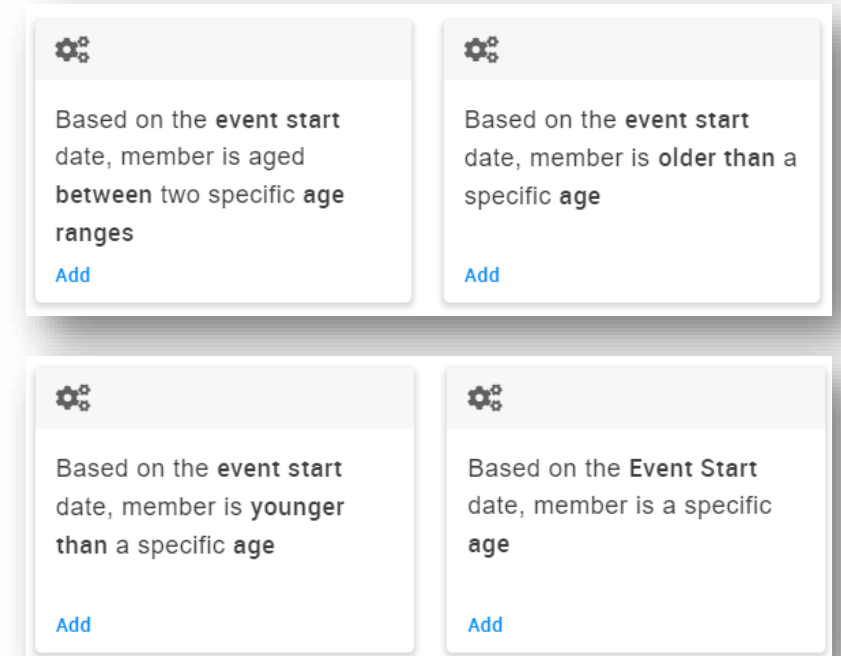
Note: These rules are only available to be applied as Discounts and Surcharges.



Are there Rules only for event tickets?

Additional age rules are available for use with event tickets.

For example, tickets can be restricted to members who would be 18 or over on the day of the event even if they are under 18 at the time of purchase.



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