

Additional Approval Restrictions



What is an Additional Approval Restriction?

Additional Approval Restriction rules can be applied to membership categories, allowing admins to manage membership purchases for both new and existing members. These rules serve as an additional layer to already existing restriction rules which only permits new members to purchase memberships after receiving club-level approval.

How does it work?

Admins must manually approve each member's profile to allow them to view and purchase memberships. This ensures that admins have complete control over which members can access and buy memberships for their club.

Please note: This is a manual process and cannot be automated.

Additional Approval Restrictions



How does the Additional Approval Restriction work for new members?

For new members, the Additional Approval Restriction acts as a second layer of restriction. Initially, all new club members must be “Pending Approval,” meaning they need to be approved before joining the club. Once they are approved and become part of the club, they gain the eligibility to purchase a club membership.

At this point, the Additional Approval Restriction comes into play. Although these new members have been approved to join the club, the admin must still manually approve their profiles again to allow them to view and purchase memberships. This creates an extra layer of approval specifically for new members.

How does the Additional Approval Restriction work for existing members?

For existing members, the Additional Approval Restriction is the only required layer of restriction. Since these members are already part of the club, they are eligible to renew their memberships. However, with the Additional Approval Restriction in place, they can only see and purchase memberships if they have received explicit approval or permission from the club admin.

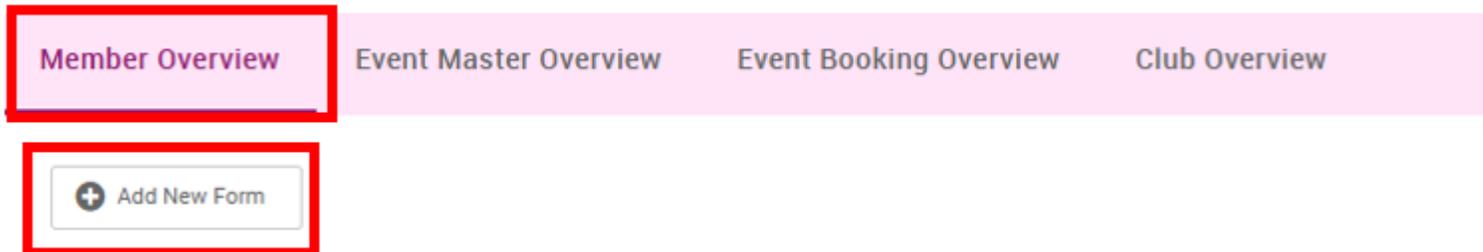
Note: If applied, Additional Approval Restriction rules will apply to all members. These rules cannot be selectively applied to existing members only.

How to add Additional Approval Restrictions

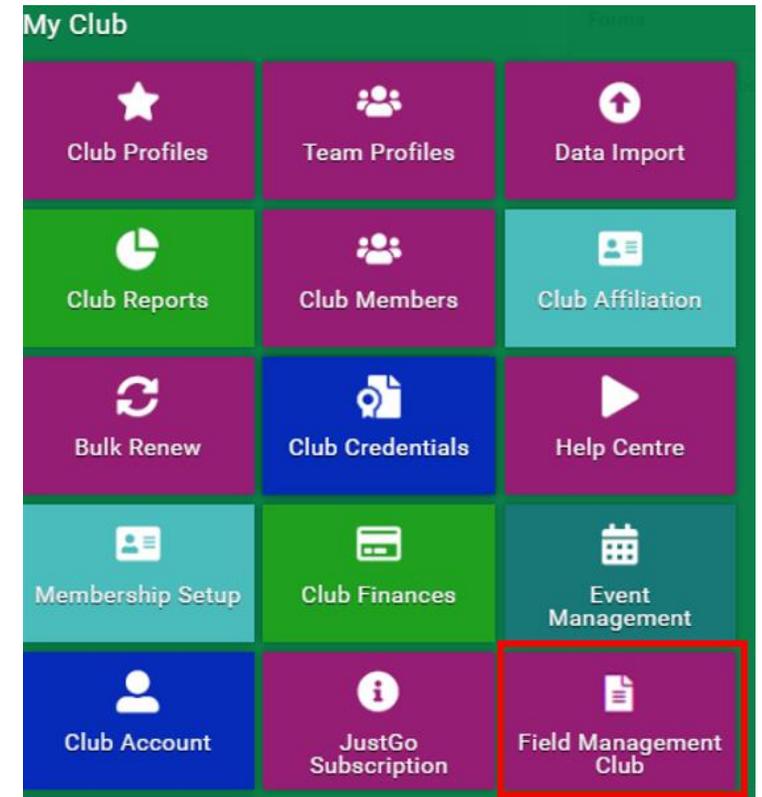
Step 1: Field Management

- Open **Field Management Club** and click on “**Member Overview**”
- Add a **New Form**
- The form name can be “Admin Approval” or “Working Bee Levy Approval.”
The club can choose a different name for the form if desired.

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How to add Additional Approval Restrictions

Step 1: Field Management

- Check the “**Hide from Members box**”
- Add Field
- Change Label Text 1 to “**Admin Approval**” on both sides.
- Change the format from Short Answer to **Tickbox**
- Click **Save**

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Security

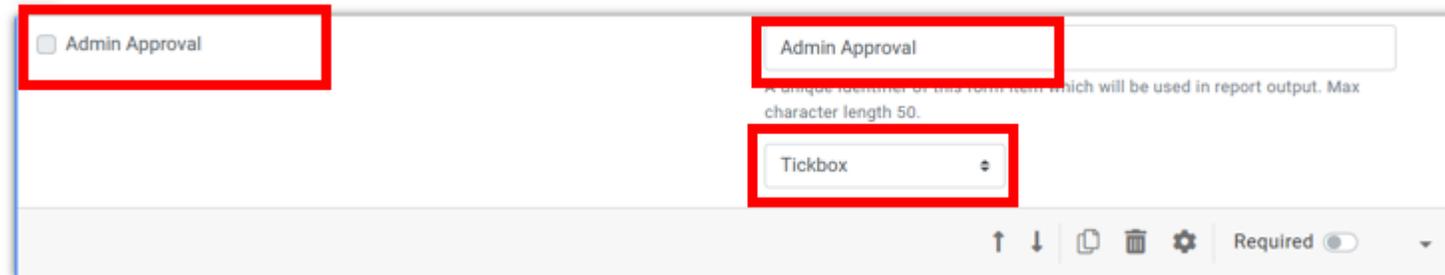
Hide From Members

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2 Fields and Sections



3



Admin Approval

Admin Approval

A unique identifier of this form item which will be used in report output. Max character length 50.

Tickbox

↑ ↓ Copy Delete Settings Required

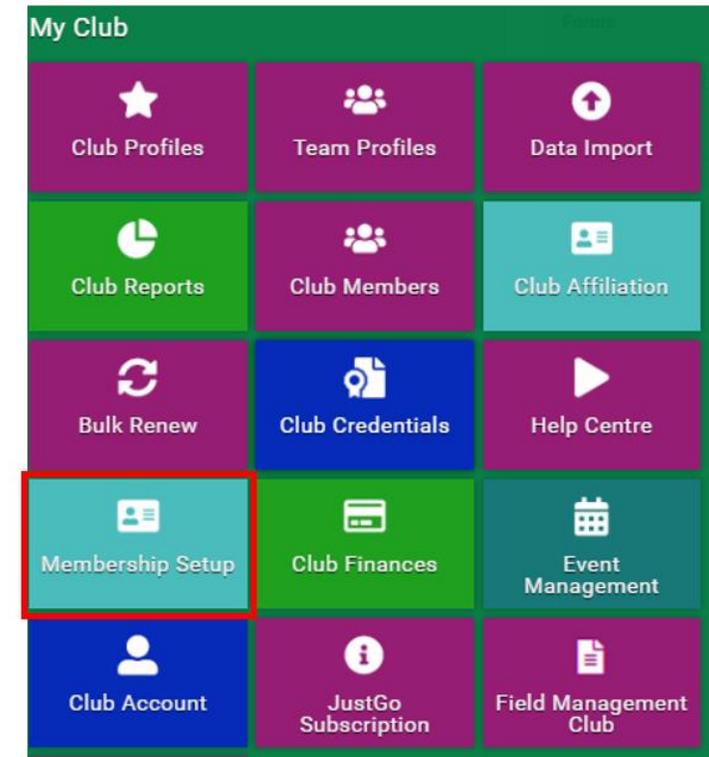
How to add Additional Approval Restrictions

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Step 2: Membership Setup

- From the Menu tab, click on **Membership Setup**.
- Click on **Edit Membership**
- Scroll to **section 5 – Restriction, Discounts and Surcharge**.
- Click on **“Add new purchase rule”**
- For Purchase Rule Description, enter **“Admin Approval.”**

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5 Membership Restrictions, Discounts & Surcharges

Restrictions Discounts Surcharges

Use purchasing rules to restrict which group of members are able to buy this membership. There are a list of standard rule types which can be grouped together to form different combinations, eg. Age Rule & Gender Rule.

Additional classification rules may be applied by Pony Club Australia or State which may further restrict a member seeing this membership (e.g. age rules).

Add new purchase rule

Description	Active
No record found.	

How to add Additional Approval Restrictions

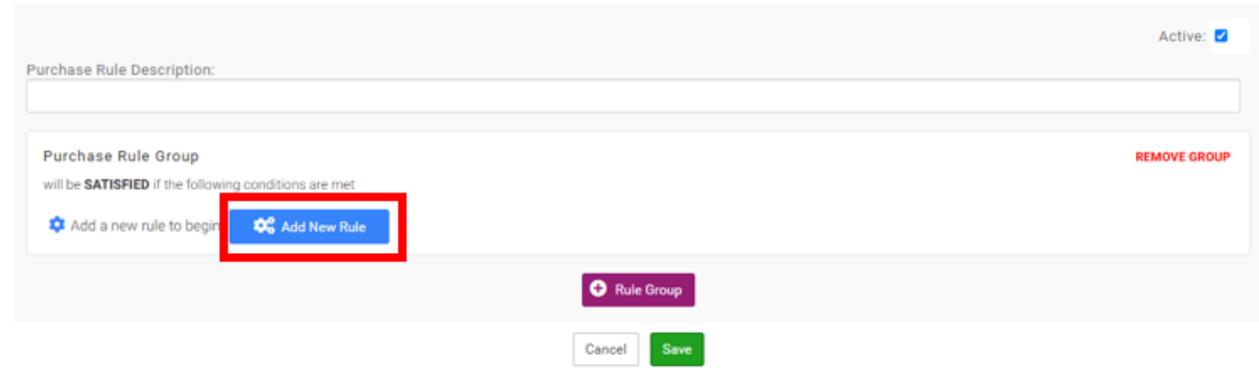
1

Step 2: Membership Setup

- Click “Add new rule”
- Select “**The specified profile field for the member is set to the following value**”

This rule can be found under
“**Member/Club Profile Rules**”

- Click “Add”



Purchase Rule Description:

Active:

Purchase Rule Group REMOVE GROUP

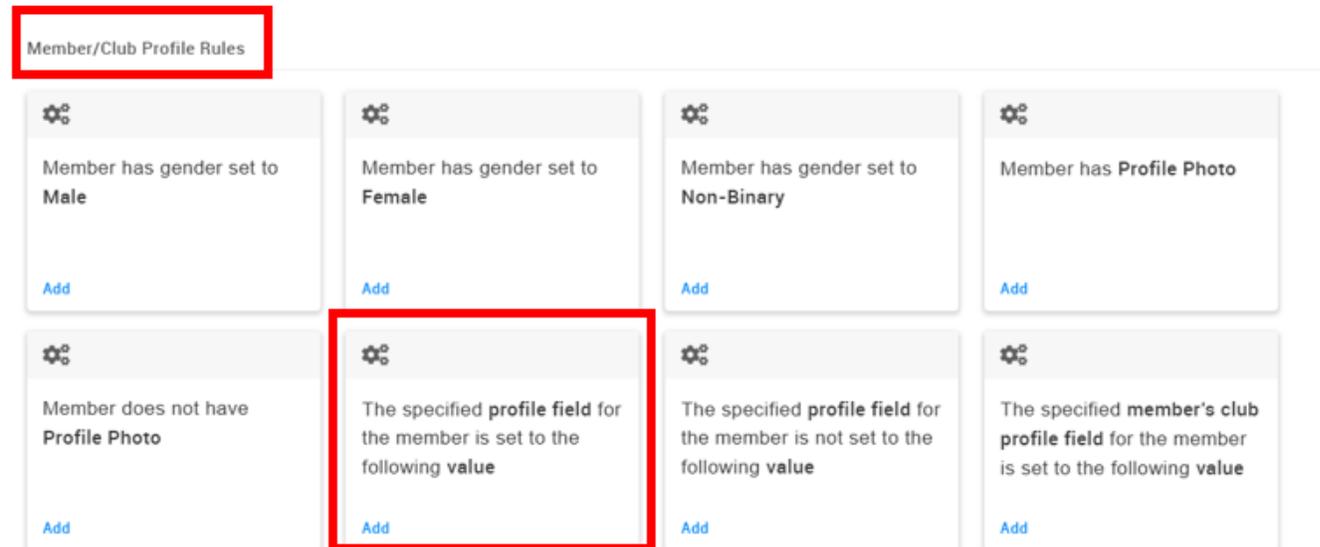
will be **SATISFIED** if the following conditions are met

[Add a new rule to begin](#) [Add New Rule](#)

[Rule Group](#)

[Cancel](#) [Save](#)

2



Member/Club Profile Rules

 Member has gender set to Male Add	 Member has gender set to Female Add	 Member has gender set to Non-Binary Add	 Member has Profile Photo Add
 Member does not have Profile Photo Add	 The specified profile field for the member is set to the following value Add	 The specified profile field for the member is not set to the following value Add	 The specified member's club profile field for the member is set to the following value Add

How to add Additional Approval Restrictions



1

Step 2: Membership Setup

- The **Admin Approval** field created under the **Field Management Club** tile should appear.
- Click on the **blue text**
- Tick the checkbox for **Admin Approval field**
- Click **Save** to save the rule and then click **save** again to save the membership setup.

A screenshot of a web interface showing a section titled "Admin Approval". Below the title, there is a blue text link that says "- Admin Approval". This link is highlighted with a red rectangular box.

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Note: Follow the Step 2 process for all membership categories that require admin approval.

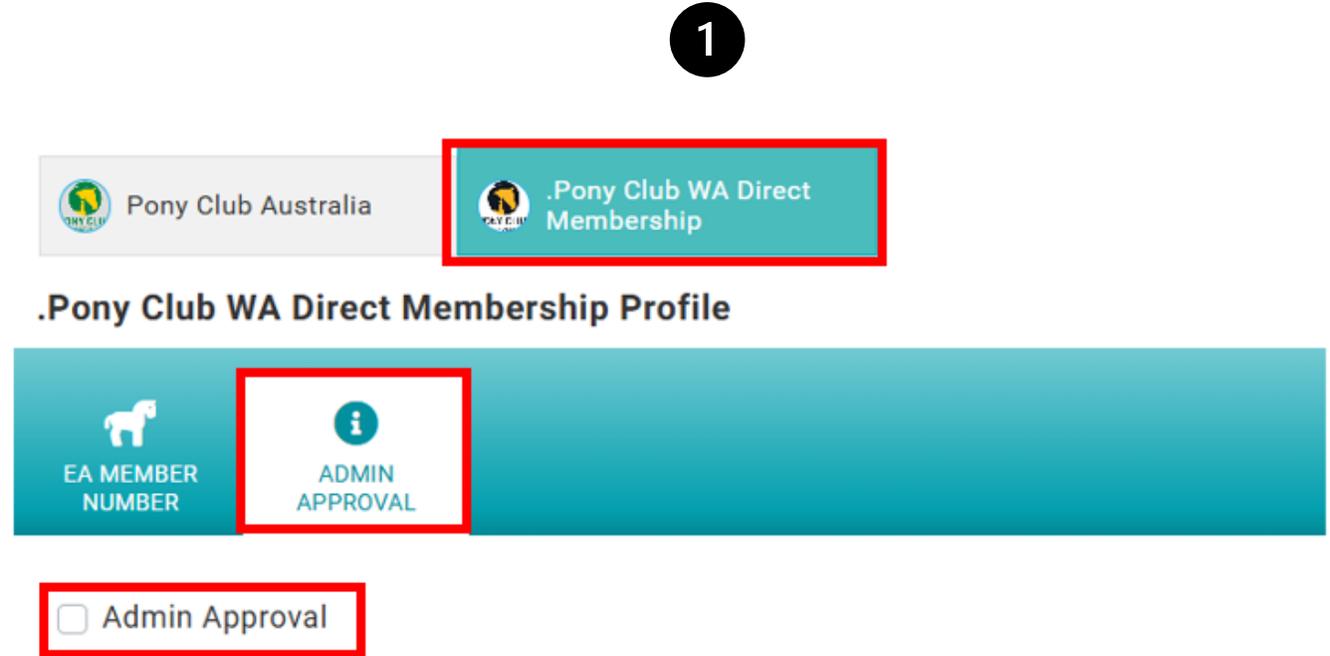
A screenshot of a web interface for configuring a "Purchase Rule Group". At the top right, there is a toggle for "Active:" which is checked. Below this is a text input field for "Purchase Rule Description:". The main section is titled "Purchase Rule Group" and contains the text "will be SATISFIED if the following conditions are met". There is a red "REMOVE GROUP" button in the top right corner of this section. A list of conditions is shown, with the first one being "The field Admin Approval for the member is set to" followed by a checked checkbox. Below the conditions is a blue button labeled "Add New Rule". At the bottom of the form, there is a purple button labeled "+ Rule Group", a "Cancel" button, and a green "Save" button.

How to add Additional Approval Restrictions

Step 3: Approval/Permissions

- Click on **Club Member's** tile
- Click on **Member's** profile
- Click on **Additional Details**
- Click on the **Club name** on the header
- Click on **Admin Approval**
- Tick the **Admin Approval** checkbox
- **Click Save**

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The screenshot shows the Pony Club Australia interface. At the top, there are two navigation tiles: 'Pony Club Australia' and '.Pony Club WA Direct Membership'. The second tile is highlighted with a red box. Below this is the header '.Pony Club WA Direct Membership Profile'. Underneath is a teal bar with three buttons: 'EA MEMBER NUMBER', 'ADMIN APPROVAL', and an unlabeled button with an information icon. The 'ADMIN APPROVAL' button is highlighted with a red box. Below the teal bar is a checkbox labeled 'Admin Approval', which is also highlighted with a red box and has a small '1' in a black circle above it.

Using the same instructions, permissions and approvals can be reset for the new membership year.

If you have any questions regarding the process of resetting or adding these additional restrictions, please contact PCA @ Support@ponyclubaustralia.com.au