



Smart Rules

User Guide for JustGo

What's inside?



- [What are Smart Rules?](#)
- [How do I apply Smart Rules to a Membership?](#)
- [How do I apply Smart Rules to an event ticket?](#)
- [Can a Rule start or stop working on a specific date?](#)
- [What is a Rule Group?](#)
- [Types of Rules](#)
- [Are there Rules only for event tickets?](#)

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 subscription type.

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.

5

Membership Restrictions, Discounts & Surcharges

Restrictions

Discounts

Surcharges

Use purchasing rules to restrict which group of members are able combinations, eg. Age Rule & Gender Rule.

+




Add new purchase rule

Description

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.

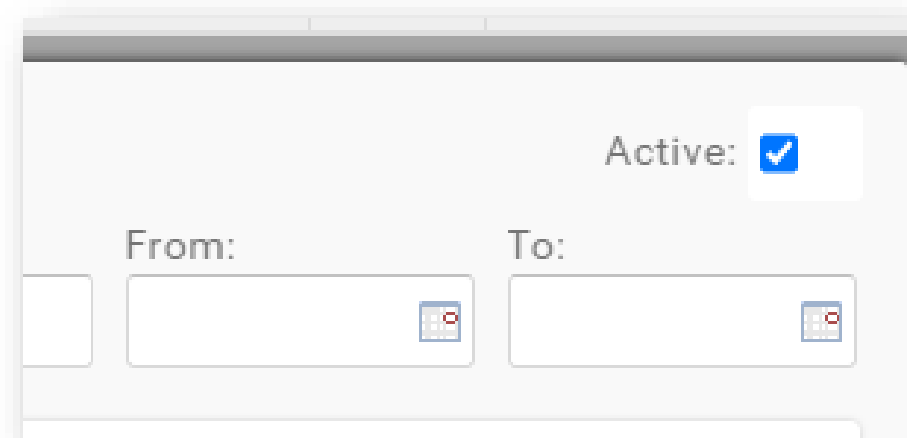
Note: You will have to set the basic ticket details and select the green tick to confirm the ticket before the settings icon is available.

	Price	Quantity available	
	£5.00	0	  

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 user interface for configuring a rule. At the top right, there is a label 'Active:' followed by a blue checkbox with a white checkmark. Below this, there are two date selection fields. The first field is labeled 'From:' and the second is labeled 'To:'. Each field consists of a small square icon on the left and a larger rectangular input box on the right. The input boxes are empty, and each has a small calendar icon on its right side.

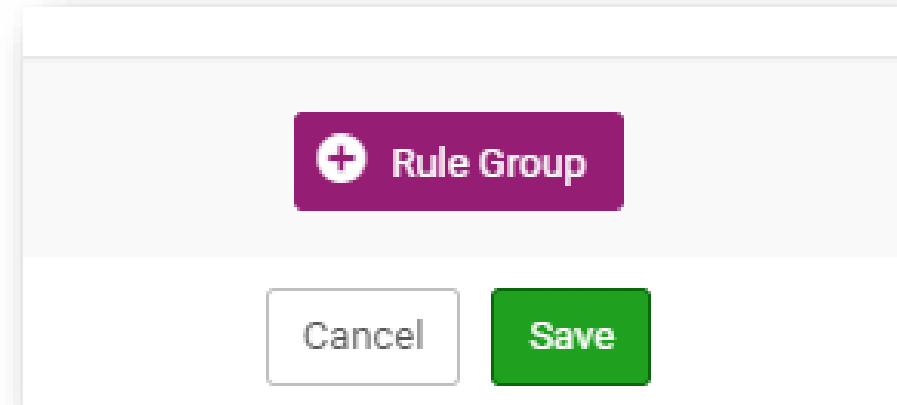
What is a Rule Group?

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.

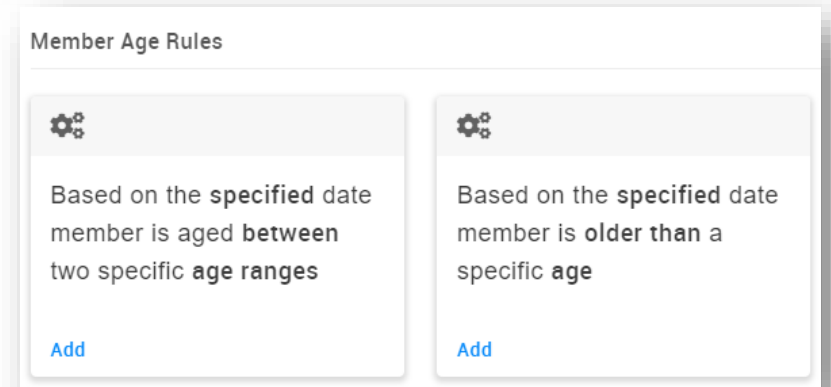
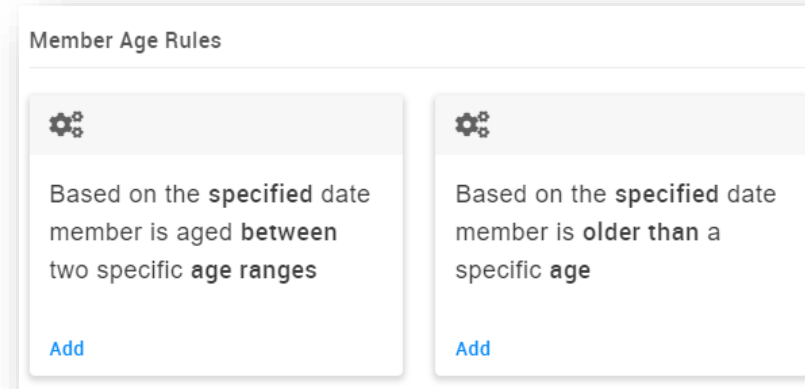
For example, if a 10% discount is to be applied for members under 18 or over 60, you will need to apply two groups containing the different age rules.



What are Member Age Rules?



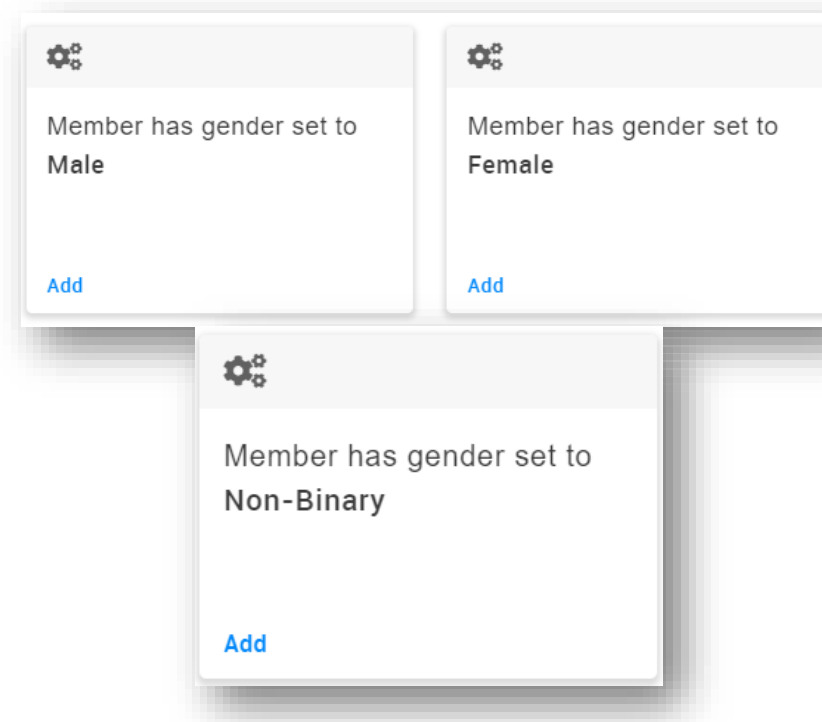
These rules refer to the age of the member. For example, if a membership is restricted for only those over 18, the “Based on the specified date, member is older than a specific age” rule can be used.



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, Female Non-Binary rules will be available in the member profile. It is possible to add additional gender options. This will then reveal additional rules to accommodate.

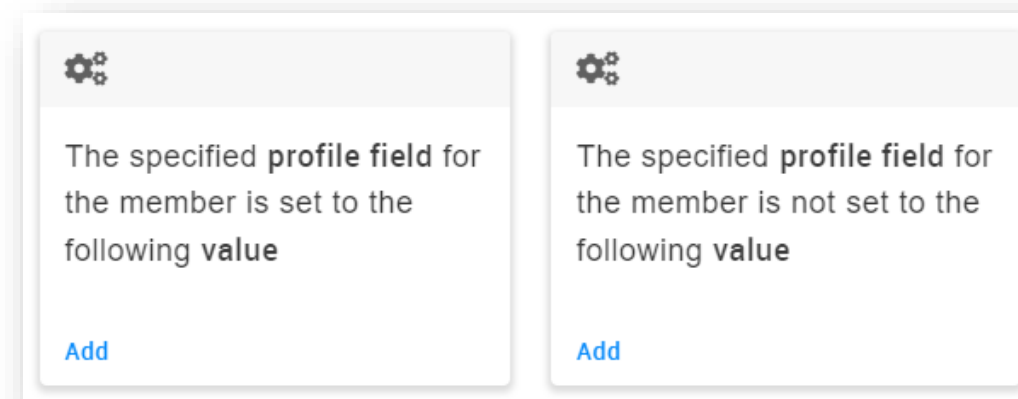


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What are Member/Club Profile Rules?

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.

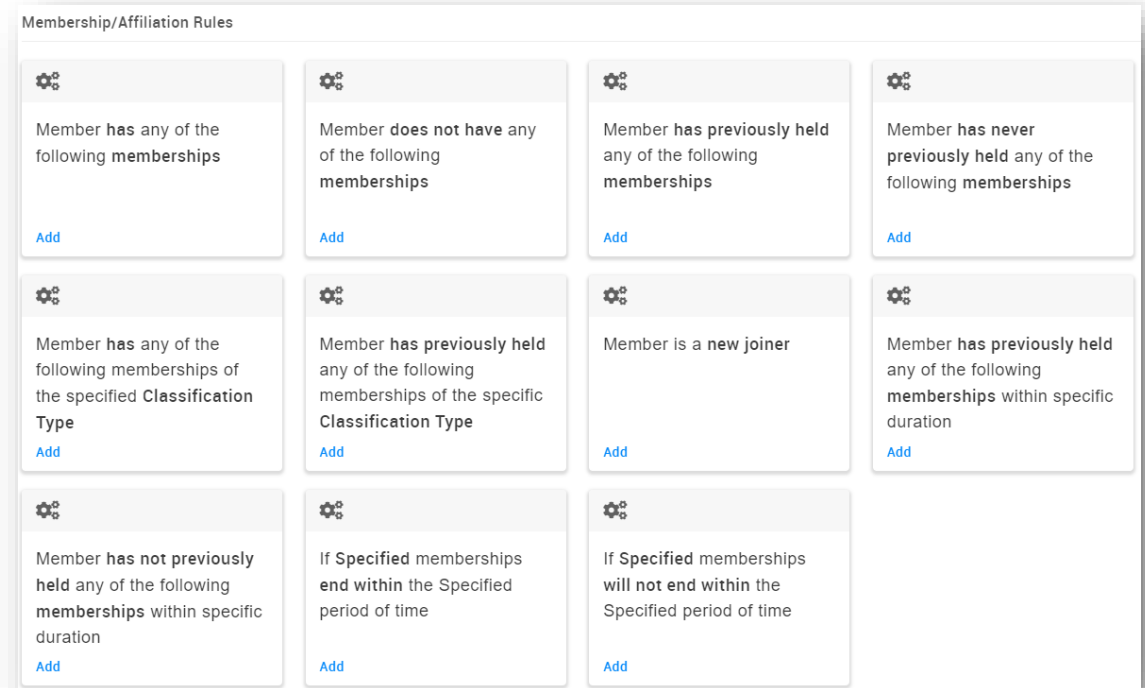


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What are Membership/Affiliation Rules?

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

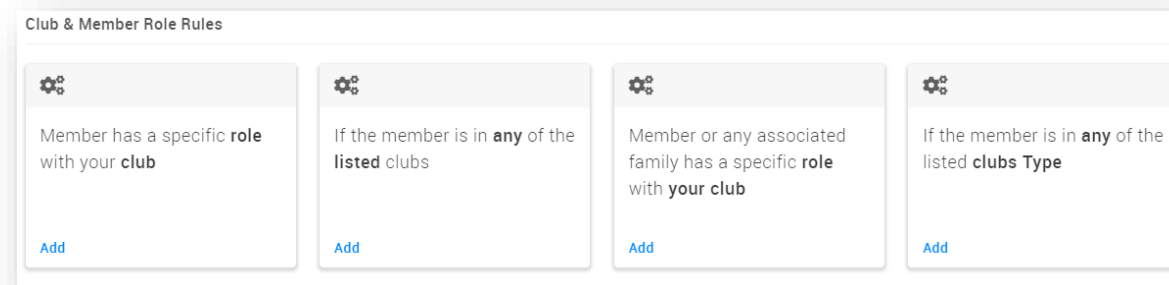
For example, the “New Joiner” rule can be used to provide a discount for members who have never held a membership before and are joining for the first time.



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.

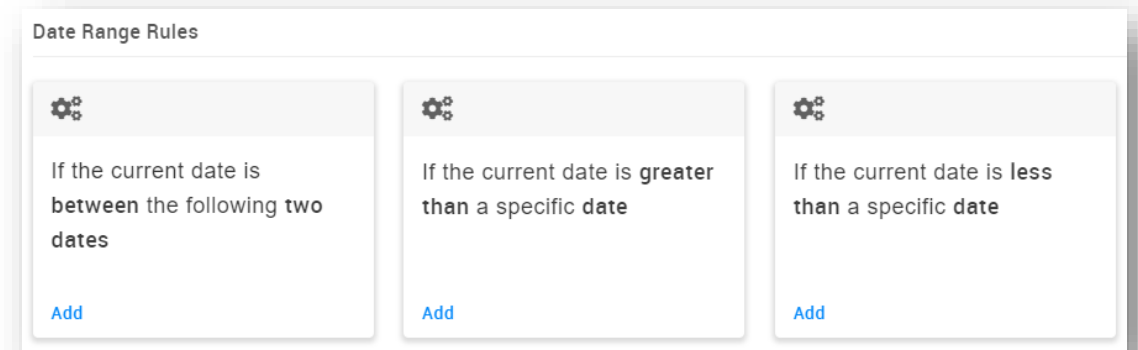


What are Date Range Rules?



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.

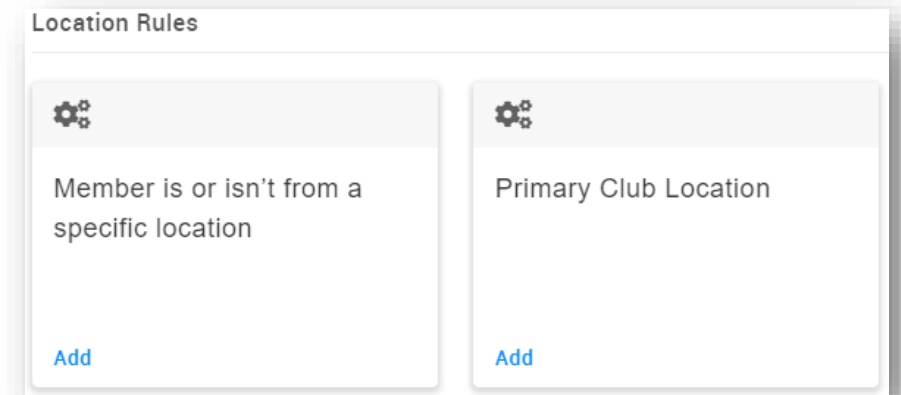


What are Location Rules?



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

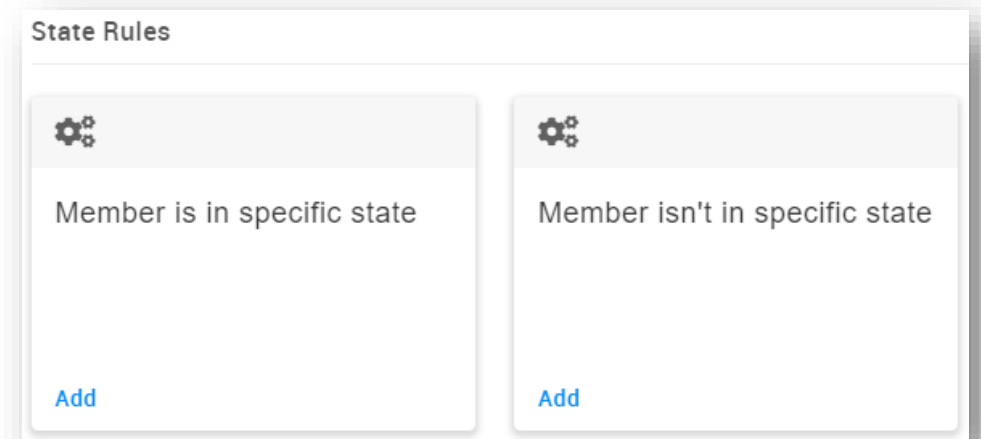
For example, a non-resident membership can be restricted to members who are from outside of the country.



What are State Rules?

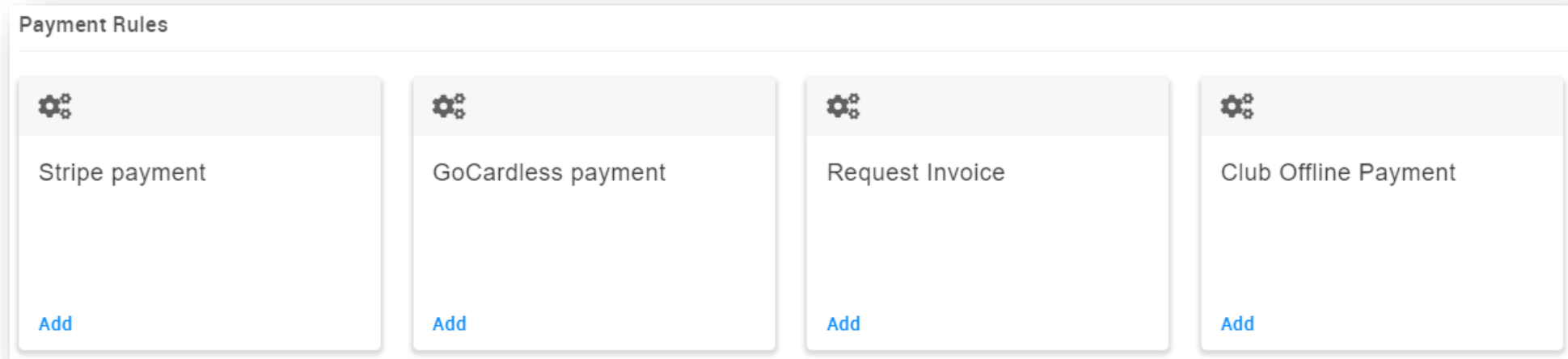
These rules refer to the status of the member record, visible from the Members tile.

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



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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, similarly invoice and offline payment are indicating to their respective option in cart level .

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.

