How to Set Up and Manage RESTRICTIONS, DISCOUNTS & SURCHARGES

This guide has been designed to assist you in the process for setting up **Restrictions Discounts & Surcharges** that can be placed on Memberships and Event Tickets on the CRNZ Club Membership & Paddler Portal.

This guide is in addition to both the Field Management, Club Administrator and Club Setup guide.

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There is further information how to manage each of the following features and functions in the Club Administrator Support Guide or on the Support Page on CRNZ website.

If unsure, if you have any questions or if you require assistance, please contact us at membership@crnz.org
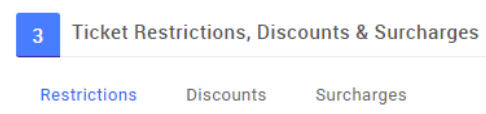
ABOUT RESTRICTIONS DISCOUNTS & SURCHARGES

These functions can create rules around who can purchase a membership or event ticket, when a discount will be applied to a membership or event ticket and when a surcharge will be applied to a membership or event ticket.

In Step 5 of the Membership set-up; "Membership Restrictions, Discounts & Surcharges" and in Step 3 of the Event Tickets set-up; "Ticket Restrictions, Discounts & Surcharges" you can set rules around when a Membership or Ticket can be purchased, when a discount is to be applied and when a surcharge is to be applied.
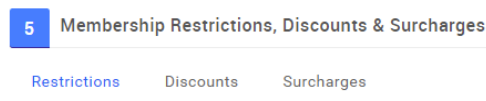
The detail on the set-up of Memberships and Events and their Tickets can be found in the relevant guides.

ADDING A RULE

You will see there are three (3) headers under "Membership/Ticket Restrictions, Discounts & Surcharges".

The first is **Restrictions.** Rules that are added here are referred to as Purchase Rules. These rules define who can see and purchase the Membership or Ticket. Only when the rules you list are SATISFIED will the Membership or Ticket appear for an individual.

The second is **Discounts**. As with the above, only when the rules you list under this section are satisfied will a discount be applied.

The third is **Surcharges**. Once again, a surcharge (an additional fee) will be applied only when the rules you create are satisfied.

Each time you click on the "Add New Rule" button there will be a pop up with the different rules available. To assist you with navigation and understanding what type of rule you are applying and to which Membership, at the top, you will see in bold the type, either "Purchasing Restrictions Rules", "Discount Rules" or "Surcharge Rules" and then the name of the membership you are adding this rule to will be in lighter grey font.

PRE-SET MEMBERSHIP RULES

The CRNZ Club Membership & Paddler Portal has already set some rules in the system with regards to Membership Purchase. For example the standard Junior Membership has a restriction to only allow U18 paddlers

PRE-SET EVENT RULES

The CRNZ Club Membership & Paddler Portal has already set some rules in the system with regards to Events Tickets. You will see these rules in the Event Templates - Try Learn Explore.
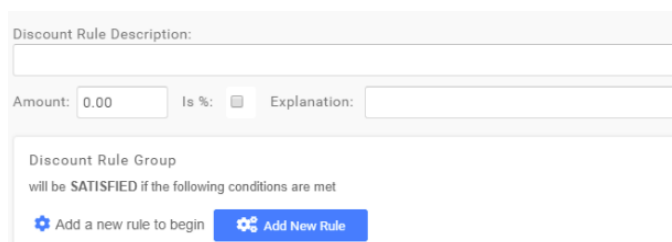
SET-UP

Depending on which type of rule you are applying (Purchase, Discount or Surcharge), you will have different fields available that need to be set-up.

In all instances, you will have "Description". This is what you see as a Club administrator, members will not see this description, so it just needs to make sense to you in the backend of the system.

With Discounts and Surcharges, you will also have "Amount", "is %" and "Explanation". "Amount" is the value of the discount or surcharge to be applied when all conditions have been met.

"Is %", when ticked means the value you entered into "Amount" is a percentage to be applied either off or on the Price. When it is not ticked it means the amount you entered will be applied as a dollar value.

The amount, either as a dollar value or a percentage will be taken off the total Club portion of the fee. i.e if you enter 25 and do not tick the "is %" box on a $150 membership, $25 will be discounted from the price.

"Explanation" is the text users will see when the discount or surcharge is applied in at checkout so make sure it is descriptive yet succinct. After setting in the description, value and explanation, you need to click on the blue "Add New Rule" button to then select from the different rule types, as detailed below.

RULE TYPES

There are currently five (5) rule type groupings. These are:
1. Member Age Rules
2. Member Profile Rules
3. Membership Rules
4. Club & Member Role Rules
5. Date Range Rules

MEMBER AGE RULES

Within the Member Age Rules there are four (4) rules available. All of these rules are based on the members age at a specified date.

When you add any of these four (4) rules, you will have the option to determine at what date the age rule will apply. They all default to "**based on the specified date**" however, this can be changed to the "**Current date".**

Current date refers to the date that the individual is making the purchase.
Specified date gives you the ability to determine a date in the previous year, next year or a specified year. i.e if a Member has to be 21 by 31st December in the year they are registering, you would select "**Next", "Dec", "31**".

This will need to be set for all age rules that are applied.

1. Member is aged between two specific age ranges
When you apply this, you will be able to enter two ages. The Member must be BETWEEN those two ages for your rule to be applied either on the date of purchase or on the date that you specify.

2. Based on the current date member is aged over
When you apply this, you will be able to enter one age. Only when the member is OVER this age will the rule apply. For example, if you want this rule to apply to members 18 and over, you will need to enter 17 as the age.

3. Based on the current date member is aged younger than
When you apply this, as with the above rule, you will be able to enter one age. Only when the member is UNDER the age you enter will this rule apply. For example, if you want this rule to apply to members 17 and under, you will need to enter 18.

4. Based on the current date member is aged
When you apply this, once again, you will be able to enter one age. This will apply the rule only when the member is the specified age, either as at the date that they are in the system or as at your specified date.

MEMBER PROFILE RULES

Within the Member Profile Rules there are three (3) rules available. These rules are based on a particular field within the members profile. Where you have set up Forms for your Club, you will be able to set rules based on their answer to the fields within.

1. Member has gender set to Male

Only when the gender on the profile of the member is "Male" will this rule apply to them.

2. Member has gender set to Female

Only when the gender on the profile of the member is "Female" will this rule apply to them.

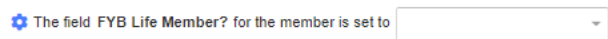3. The specified profile field for the member is set to the following value

Profile Field refers to Fields that you set up via Field Management and Value refers to the answer/selection for that Field on the member's profile.

When you select this option, you will be presented with a Pop-up which will display a list of the Forms your Club has set up and the fields/questions within them. Select the one you want to base a rule on.

A good example here would be Life Member discounts. Select your Life Member Field from the list. The pop-up will close and you will be back on the Membership screen.

You will then need to select the value entered into the field (the options here will be determined by the setup of your fields). Only when this field on the members profile is set to what you select from the answers, will the rule be applied.


MEMBERSHIP RULES

Within the Membership Rules there are seven (7) rules available. These rules are based on memberships that are held by a member.

In rules one (1) through to five (5), you will be able to select from a list of the Memberships set-up at your Club, "Any NGB Membership" which is CRNZ Membership (Club members are automatically CRNZ Members).

1) Member has any of the following memberships

The Member will only be able to see the ticket/membership or receive the discount or surcharge if they currently hold the selected Membership/s
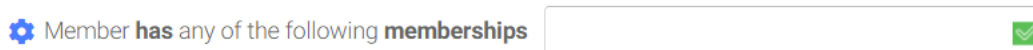
2) Member does not have any of the following memberships

The Member will only be able to see the ticket/membership or receive the discount or surcharge if they do NOT currently hold the selected Membership/s

⚙ Member **does not** have any of the following **memberships** [   ] ✅

3) Member has previously held any of the following memberships

The Member will only be able to see the ticket/membership or receive the discount or surcharge if they have previously held the selected Membership/s

⚙ Member **has previously held** any of the **memberships** [   ] ✅

4) Member has never previously held any of the following memberships

The Member will only be able to see the ticket/membership or receive the discount or surcharge if they have NEVER previously held the selected Membership/s

⚙ Member **has never previously held** any of the **memberships** [   ] ✅

5) Member has any of the following memberships of the specified Classification Type

The Member will only be able to see the ticket/membership or receive the discount or surcharge if they currently hold a Membership of the specified Classification. The Classification can be set at either the National (NGB), or Club level. For example, if you wanted to say "only people who hold any of our Club Memberships that are aligned to "Adult" can see and purchase this membership" then you would select "Adult" under the Club header in this field.

6) Member has previously held any of the following memberships of the specific Classification Type

The Member will only be able to see the ticket/membership or receive the discount or surcharge if they have previously held a Membership of the specified Classification. The Classification can be set at either the National (NGB), Club level.

⚙ Member **has previously held** any of the following **memberships** of the specific **classification type** [   ] ✅

7) Member is a new joiner

A New Joiner is someone who has not previously been attached to your Club (important to note that where they have not held an active membership

⚙ Add another rule   ⚙ **Add New Rule**

with your Club over the previous 3 years, their profile will not have been imported into the CRNZ Club Membership & Paddler Portal, which means a new profile would need to be created and as that profile will have no historical attachment to your Club, they will be considered a "New Joiner".

CLUB AND MEMBER ROLE RULES

Within the Club and Member Role Rules, there are two (2) rules available.

    1) Member has a specific role at your Club

The Member will only be able to see the ticket/membership or receive the discount or surcharge if they are listed as having the selected role in your Club.

    2) Member or any associated family has a specific role with your club

The Member will only be able to see the ticket/membership or receive the discount or surcharge if they, or any of the members in their family grouping are listed as having the selected role in your Club.

DATE RANGE RULES

Within the Date Range Rules there are three (3) rules available. These rules are based on the date that the member is entering the system purchasing or attempting to purchase membership.

    1) If the current date is between the following two dates

When you select this option, you will be presented with two date fields to be entered. Only when the date the member is in the system is between these dates will they be able to see this membership/ticket or have the discount or surcharge applied.

    2) If the current date is greater than a specific date

When you select this option, you will be presented with a single date. Only when the date the member is in the system is greater than the one entered will the member be able to see the membership/ticket or have the discount or surcharge applied.

3. If the current date is less than a specific date

As with the rule above, when you select this option, you will be presented with a single date. Only when the date the member is in the system is less than the one entered will the member be able to see the membership or have the discount or surcharge applied.

POPULAR APPLICATION OF RULES

Below is a list of common rules for Memberships and Events and how to apply them;

I want to apply a 15% "early bird" discount

To apply a discount for Members registering before a particular date, in the Discounts Tab, click on "Add New Discount Rule". Enter the Rule Description and Explanation into the fields provided then enter 15 in the Amount field and tick the Is % box. Click "Add New Rule"

I want to apply a discount for Life Members of my Club
To apply a discount for Life Members, you will first need to ensure you have "Life Member" set up as a field within Field Management and that you have assigned this to all of your Club's Life Members.
In the discount tab, click on "Add New Discount Rule", enter the Rule Description and Explanation into the fields provided then enter the value or percentage of discount that is to be applied. Click "Add New Rule" button then select "The specified profile field for the member is set to the following value" and select your "Life Member" field from the list. When you are returned to the Membership Setup screen you will need to select "Yes" as this indicates a member is a Life Member for your Club.

I want to apply a 25% discount to all Members over 65
To apply a discount for Members over 65 years of age, in the Discounts Tab, click on "Add New Discount Rule" enter the Rule Description and Explanation into the fields provided then enter 25 in the Amount field and tick the "Is %" box. Click "Add New Rule" button and select "Based on the current date member is older than a specific age". When you are returned to the Membership Setup screen you enter "64" in the field provided.

I want to apply an additional $40 fee for Members who are new to my Club
To apply a surcharge for Members who have not been with your Club previously, in the Surcharges Tab, click on the "Add New Surcharge Rule" enter the Rule Description and Explanation into the fields provided then enter 40 in the Amount field and DO NOT tick the "Is %" box. Click on "Add New Rule" and select "Member is a new joiner" from within the Membership Rules.

I want to restrict the purchase of Membership to users who have an existing Membership
To restrict a Member from purchasing a certain membership if they already have a particular membership, for example a member can't purchase a free trial membership if they already have membership, in the Restrictions Tab, click on "Add New Purchase Rule". Enter the Rule Description into the field provided then click on "Add New Rule" then "Member has any of the following memberships" then click on the "green arrow" and select the relevant membership type.

I want to restrict the purchase of an Event Ticket to people who have an existing Membership with my Club
To restrict an Event to Club Members only, in the Restrictions Tab, click on "Add New Purchase Rule". Enter the Rule Description (e.g. Members Only) into the field provided then click on "Add New Rule" then select

"Member has any of the following memberships" then click on the "green arrow" and select the relevant membership type/s or "Any Club Membership" to include all of your Club Memberships.