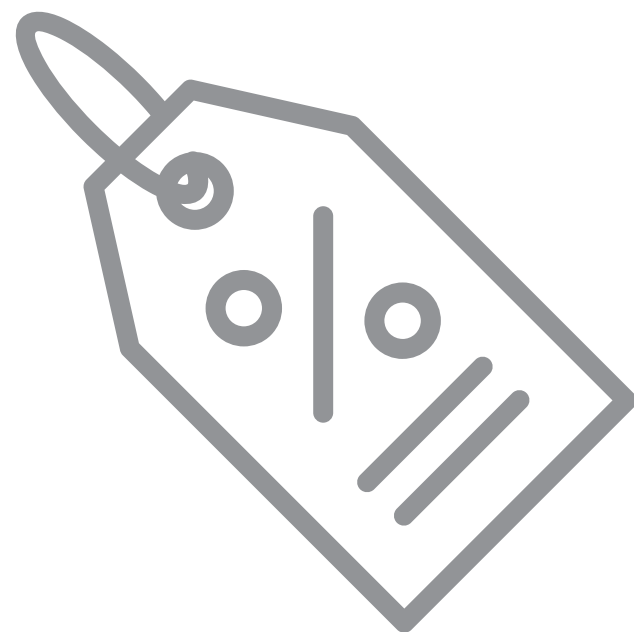
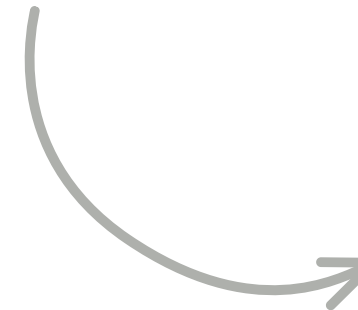




Individual Discount Feature Guide

What's New

- Practitioners can now apply a **patient-specific discount** using the new Individual Discount feature
- This allows practitioners to customize discounts on a **per-patient basis** instead of relying only on a universal discount applied across all patients



 **Add Patient(s)** ×

 Your patient(s) will need a recommendation after save

First Name

John

Last Name

Smith

Email

jsmith@gmail.com

Individual Discount

Applies to all future recommendations, orders, and subscriptions for this patient.

23%  

 Overrides your universal discount for this patient only.

Add to list

Key Rules to Know

- Individual discounts are set per patient
- An individual discount **overrides** the practitioner's universal discount for that patient
- The discount will continue to apply to that patient's future recommendations, orders, and subscriptions unless updated or removed
- Updating a patient's individual discount **will not change** the discount applied to existing subscriptions; active subscription orders will continue using the original discount set at the time the subscription was created
- Removing the individual discount will return the patient to the practitioner's universal discount (if one exists)

What Patients Will Experience

- Patients will automatically see the updated pricing tied to their account in their **Account Settings**
- The individualized pricing will apply anywhere eligible products are purchased for that patient

 Practitioner Details	
Practitioner Name Dr. Funnel Test	Practice Discount 10%

Ways to Set an Individual Discount

Practitioners can apply an individual discount in **three** different workflows depending on where they are in the platform

1

2

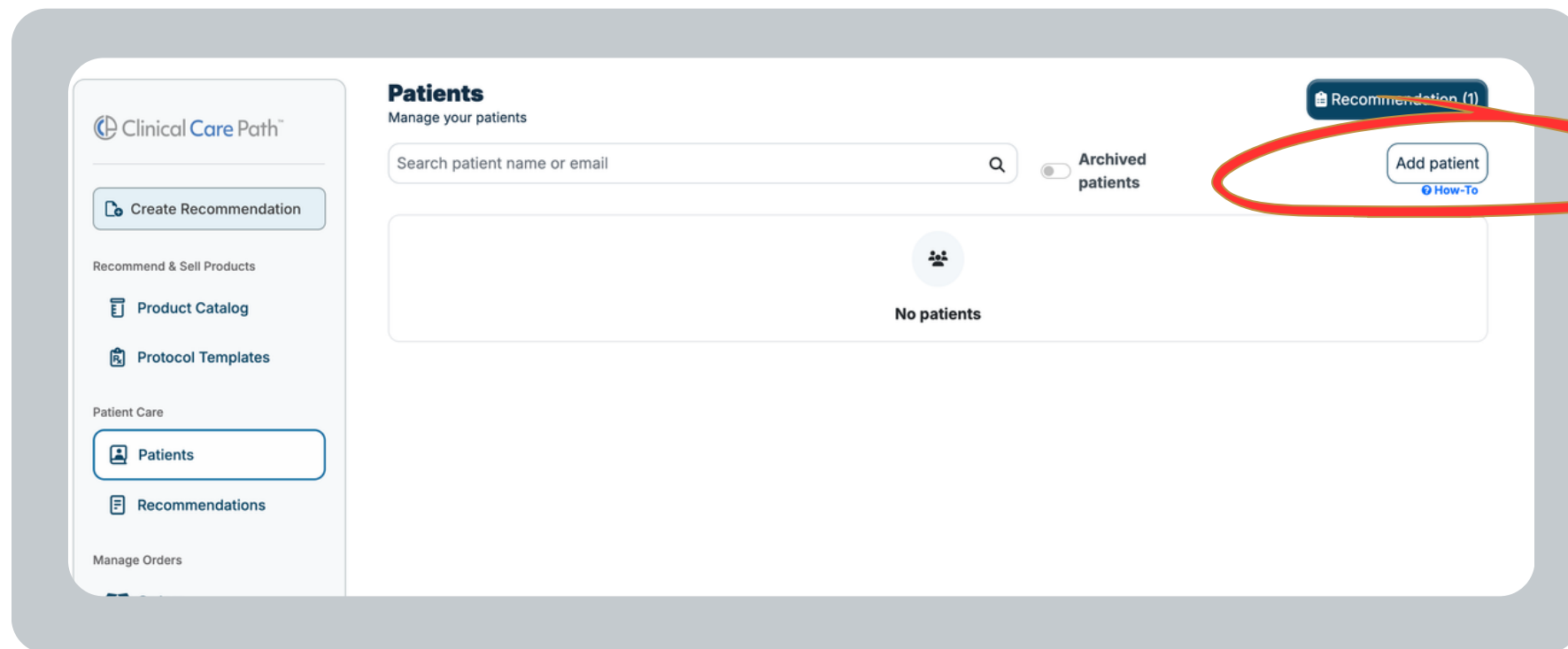
3

1

While Adding a New Patient

Best for: Setting a discount during patient onboarding

- Go to “Patients” tab
- Click Add patient → “Add patient” tray opens
- Enter patient information
- Add individual discount during setup



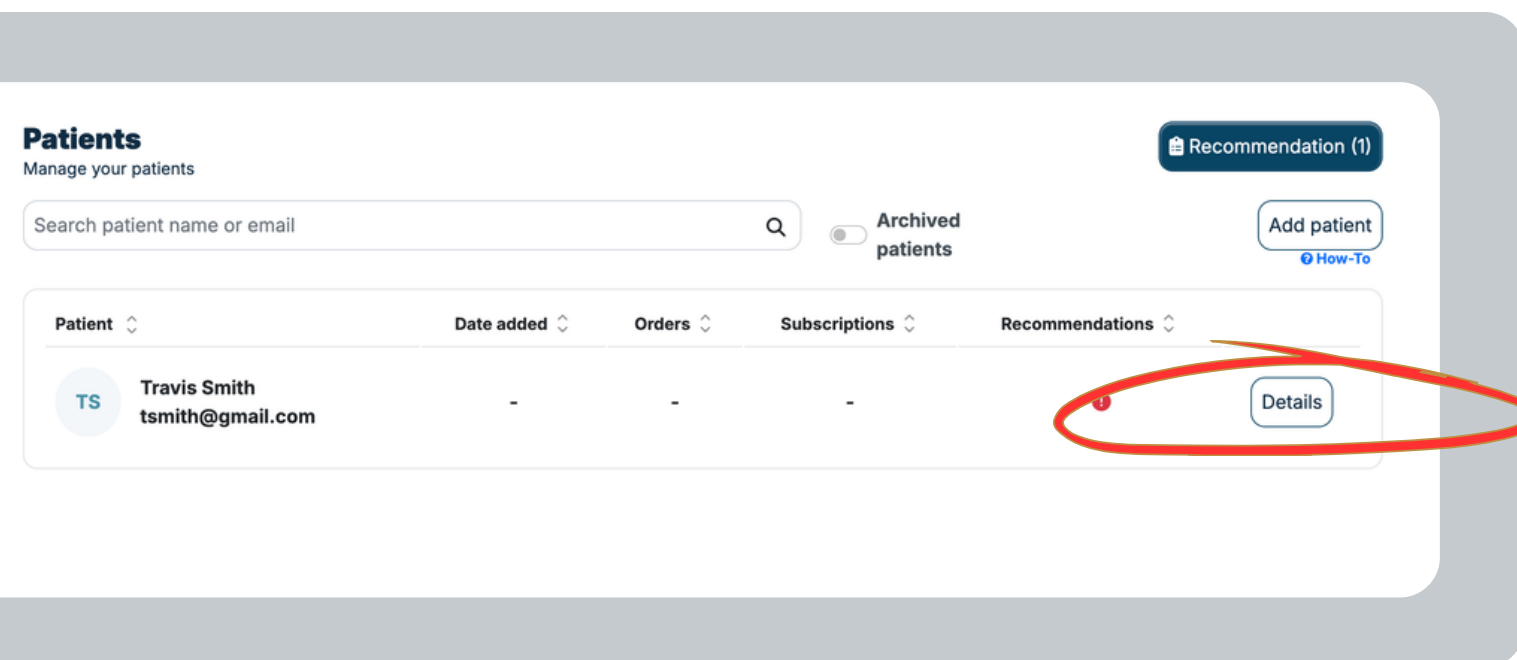
The 'Add Patient(s)' modal form is shown. It includes a close button (X) in the top right corner. A notification bar at the top states: 'Your patient(s) will need a recommendation after save'. The form contains input fields for 'First Name', 'Last Name', and 'Email'. Below these is the 'Individual Discount' section, which includes a description: 'Applies to all future recommendations, orders, and subscriptions for this patient.' and a percentage input field. A note below the discount section states: 'Overrides your universal discount for this patient only.' An 'Add to list' button is located to the right of the discount section. At the bottom, there is a 'Patient(s) to add: 0' label and a list area. The bottom of the modal features 'Cancel' and 'Save patient(s)' buttons.

2

From Existing Patient Details

Best for: Updating or managing discounts for existing patients

- Go to “Patients” tab
- Open patient details for selected patient
- Edit patient information
- Enter individual discount



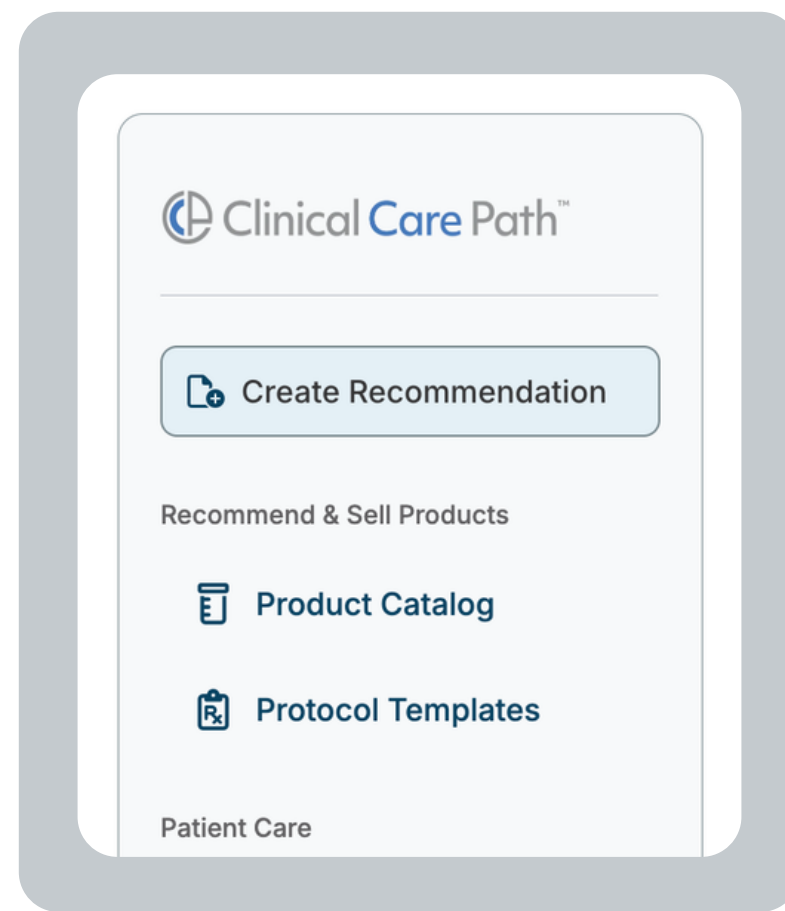
The 'Patient Details' form is shown, titled 'Patient Details' with the subtitle 'Manage your patients'. It has a 'Recommendation Cart' button in the top right. The form is divided into sections: 'Basic Information' and 'Individual Discounts'. In the 'Basic Information' section, there are input fields for 'First Name' (John), 'Last Name' (Smith), and 'Email' (jsmith@gmail.com). There are 'Cancel' and 'Save Changes' buttons. The 'Individual Discounts' section shows a list of discounts with a 'Percentage' column set to 10%. A 'Delete Patient' button is at the bottom.

3

During Recommendation Creation

Best for: Setting a discount while building a recommendation for a new patient

- Create recommendation
- Add products
- Review Recommendation → Complete recommendation
- Select patient → “Add Patient” Tray opens
- Add patient information and individual discount

A screenshot of the 'Complete Recommendation' screen. The title 'Complete Recommendation' is at the top, with the subtitle 'Finalize recommendation details'. Below this is a section titled 'Recommendation Details'. The first part is 'Patient(s)*' with a note 'Patient(s) will be notified via email' and a dropdown menu labeled 'Select patient(s)' which is circled in red. The next part is 'Subscription Details*' with a note 'Recommend a duration (Patient can change or cancel anytime)' and a dropdown menu labeled 'Select duration'. Below that is a checkbox for 'Include a personalized message'. The final section is 'Save as protocol template' with a toggle switch and the text 'Turn this recommendation into a reusable template'. At the bottom is a 'Protocol name' field with a placeholder 'Name'.

FAQ's

- **Where can practitioners set an individual discount?** Practitioners can set an individual discount in three places:
 - While adding a new patient
 - Within patient details
 - During recommendation creation
- **Does universal discount still exist?** Yes. Both universal and individual discount are available for our practitioners to use. If a practitioner has both a universal and individual discount set, the individual discount will take priority for that patient.
- **Can a patient have both a universal and individual discount applied at the same time?** No. Only one discount can apply at a time. If an individual discount is set for a patient, it will override the practitioner's universal discount for that patient.
- **What happens if the individual discount is removed?** If a practitioner has a universal discount enabled, the patient will return to receiving the universal discount once the individual discount is removed.
- **Does the individual discount apply to future orders?** Yes. The individual discount will continue to apply to that patient's eligible recommendations and orders unless it is updated or removed.
- **Can practitioners update or change an individual discount later?** Yes. Practitioners can edit or remove an individual discount at any time through the patient details section.
- **If a practitioner updates a patient's individual discount, will it change existing subscriptions?** No. If a subscription was originally created with a specific individual discount, that discount will continue to apply to future recurring subscription orders tied to that subscription. Any updated discount will apply only to new recommendations, orders, or newly created subscriptions moving forward.