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# RECTRAC 3.1 GOLF TOURNAMENT SALES

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# RECTRAC 3.1 GOLF TOURNAMENT SALES



## Golf Tournaments - Overview

RecTrac 3.1 will be used to process the financial transactions involved with golf tournament sales. There are two kinds of tournaments based on how signups are taken:

**Contract Tournaments** – This is a golf tournament that is being sponsored by a company or command. Individual sign ups will not occur in the pro shop; money will be paid in bulk by who ever is hosting the tournament.

**Individual Tournaments** – This is a golf tournament being hosted by the course where anyone can sign up and pay to enter.

Below is an explanation of how the general flow of a tournament transaction will occur in the POS.

<b>Tournament Sale Phases</b>	
Phase 1	<ul style="list-style-type: none"><li>Initial tournament contract is written.</li><li>A pre-payment is made to hold the contract.</li></ul> OR <ul style="list-style-type: none"><li>An individual sign up service item is created and set up for sales.</li></ul>
Phase 2	<ul style="list-style-type: none"><li>Depending on the size of the tournament contract, pre-payments might be made leading up to the event.</li></ul> OR <ul style="list-style-type: none"><li>Individual signups will occur leading up to the event.</li></ul>
Phase 3	<ul style="list-style-type: none"><li>On the day of the tournament, amounts paid into the tournament and counts are applied to the following buckets:<ul style="list-style-type: none"><li>Tournament Rounds</li><li>Tournament Carts</li><li>Tournament Food</li><li>Gift Certificates.</li></ul></li><li>If it's a contract tournament, the customer supplies the final payment to complete the transaction (if applicable).</li></ul>

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## Phase 1: Contract Tournaments – Taking Prepayments

**Note:** Contract tournaments require a customer household account in RecTrac.

Step 1: Click the 'HH Lookup' button on the POS. Lookup and select an existing customer (household) account OR click the 'Add' button to create a new customer account.

The screenshot shows a POS interface with a 'Shopping Cart' section on the left containing buttons for 'HH Lookup', 'Add HH', and 'HH Reset'. A red box highlights the 'HH Lookup' button. A red arrow points from this button to a 'Global Sales Lookup' window on the right. This window has a search bar with 'doe' entered and a 'Search' button. Below the search bar is a 'Family Member DataGrid' with columns for Last Name, First Name, Status, Birthday, Age, Grade, Gender, HH Last Name, HH First Name, HH Address 1, and HH Address 2. A table row shows 'Doe', 'John', 'Active', '0 yrs 8 mos', '0.00', 'Doe', 'John', '123 Main Street'. At the bottom of the window are buttons for 'Add', 'Change Household', 'Daily/Guest Household', and 'Select'. A red box highlights the 'Add' button.

Step 2: Navigate to the touch layer that has the tournament buttons. Select 'Tournament Prepay Contract'. The following window will display.  
**Note:** If the customer account contains multiple family members, you will be prompted to select one. Choose the primary member and hit continue.

The screenshot shows a touch layer menu with various buttons. A red box highlights the 'Tournament Prepay Contract' button. Other buttons include 'Retiree League 9', 'DOD Civilian League 9', 'Veteran League 9', 'Civilian Guest League 9', 'Retiree Comp', 'DOD Civilian Comp', 'Veteran Comp', 'Civilian Guest Comp', 'Tournament Rounds Count', 'Tournament Carts Count', 'Tournament Rounds Revenue', 'Tournament Carts Revenue', 'Tournament Food', 'Change Quantity', 'Glen Eagle Gift Cert', 'Reprint Last Receipt', '10% Member Discount', and 'Check/Logout'.

Enter in pertinent info about this tournament; this will flow into SAP.  
 Then enter in the amount being paid today and hit continue.  
 Finish the transaction by taking the customers payment.

The screenshot shows a 'Tournament Prepay Contract (SE7115-16-149-002) for John Doe (Purchase)' window. It has a 'Questions' section with a 'Golf Tournament Info \*' field containing 'Local Shopping Mart Tournament'. Below this is a 'Fees' section with a table for 'Manual Fees - Select a Maximum of 99999 Fee(s)'. The table has columns for Add, Line, Description, Amount, Discount, Quantity, Time Count, and Net Fee. A row shows a checked 'Add' button, line '6779372', description 'Default Golf Tour Contact Prepay', and an amount of '6,500.00'. At the bottom are 'Continue' and 'Cancel' buttons, both highlighted with red boxes.

Add	Line	Description	Amount	Discount	Quantity	Time Count	Net Fee
<input checked="" type="checkbox"/>	6779372	Default Golf Tour Contact Prepay	6,500.00	0.00	1.00	1.00	6500.00

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## Phase 1: Individual Tournaments – Setup

Step 1: Navigate to 'Service Item Management'. Click Add and choose the 'Default Golf Tour Pre Pay Individual – 226' option from the drop down list. Hit continue.

Default Record Add

Use this record as the default for this add ⓘ

Default Golf Tour Pre Pay Individual - 226

Cancel Continue

Step 2: Enter in the 'Service Item Code' (following the supplied coding standards) and update both 'Description' fields. Select the correct permissions code from the drop down. Then hit Save.

**Note:** If there is a set signup fee for this tournament, access the fees screen and enter in the amount. Otherwise it will default to 0 and the clerk will input an amount at the time of sale.

Core Fees Rules Questions Comments UPC Codes

### POS Service Item Update

**Core Settings**

Service Item Code \* ⓘ SE7115-16-226-001

Record Type ⓘ Miscellaneous

Short Description \* ⓘ Memorial Day Tournament

Long Description ⓘ Memorial Day Tournament

Department \* ⓘ Golf

Type \* ⓘ Golf - Tournaments

SubType \* ⓘ None

Status ⓘ Active

Permissions \* ⓘ (1) SE MDS Glen Eagle Pro Shop 7115

Include in Demographics? ⓘ

**WebTrac Settings**

**Miscellaneous Settings**

**Gift Certificate Settings**

Save Cancel Previous Next

**Note:** The item code is VERY important when setting up these service items. Coding them with the correct XXYYYY-16-226 beginning will ensure these service items show up under the 'Individual Tournament Signups' touch button already on the POS screen.

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## Phase 1: Individual Tournaments – Taking Tournament Signups.

Step 1: To charge a customer for this tournament, access the screen with your tournament buttons and click on the 'Individual Tournament Signups' button. A picklist window will display showing all active tournament service items that can be sold.

Individual Tournament Signups

Service Item	Short Description	Record Type	Type	SubType	Category
<input checked="" type="checkbox"/> SE7115-16-226-001	Memorial Day Tournament	Miscellaneous	Golf - Tournam...	None	

Service Item Quantity: 1.00

Add To Cart Cancel

Step 2: Check the box next to the applicable tournament. Change the 'Service Item Quantity' as needed (if this sale is for multiple sign ups), otherwise leave it at 1. Then click 'Add to cart.'

Step 3: If the amount for this tournament didn't auto fill in, enter in the price to charge. Otherwise accept the default fee and click continue. Finish the sale normally.

Memorial Day Tournament (SE7115-16-226-001) for Daily Guest Daily Sales Account (Purchase)

Fees

Manual Fees - Select a Maximum of 99999 Fee(s)

Add	Line	Description	Amount	Discount	Quantity	Time Count	Net Fee
<input checked="" type="checkbox"/>	6779994	Default Golf Tour Individ Pre Pay	0.00	0.00	1.00	1.00	0.00

Continue Cancel

**Note:** To keep the tournament picklist window up to date, once a tournament is over and finalized, make that service item 'Inactive' in Service Item Maintenance.

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### Phase 2: Contract OR Individual Tournaments

**For Contract Tournaments** – Additional prepayments might be made leading up to a tournament. Follow the steps under:

Phase 1: Contract Tournaments – Taking Prepayments

To process any additional prepayments for a contract tournament.

**For Individual Tournaments** – Customers will sign up during the time leading up to the event. Follow the steps under:

Phase 1: Individual Tournaments – Taking Tournament Signups

To process additional sign ups for this tournament.

# RECTRAC 3.1 GOLF TOURNAMENT SALES



## Phase 3: All Tournaments

On the day of the tournament, money previously collected towards the tournament (either through bulk prepayment amounts or individual sign ups) needs to be backed out of unearned income and applied to the applicable tournament revenue buckets. These are:

- Tournament Round Revenue.
- Tournament Carts Revenue.
- Tournament Food.
- Gift Certificates (if applicable, used for tournament prizes etc).

For proper tracking in the golf dashboard, the following counts must also be entered:

- Tournament Round Counts.
- Tournament Carts Counts. (number of riders)

This is all processed in the POS in a single transaction.

Step 1: Determine the dollar amounts that will go to each revenue bucket, and also the round/cart counts. Then access the touch screen containing your tournament buttons.

**Note:** In this example, we will process these steps as a Contract Tournament. The steps for both are almost identical: contract tournaments just require a customer account and additional info about the tournament when backing out the pre-payment amount; individual tournaments do not.

Step 2: Use the HH lookup button to select the existing customer account that was used when the initial tournament prepayment(s) were taken in.

The screenshot shows the POS interface with a 'Global Sales Lookup' window open. The 'HH Lookup' button is highlighted with a red box. A red arrow points from the 'HH Lookup' button to the 'Select' button at the bottom right of the lookup window. The lookup window displays a table of family member data.

Last Name	First Name	Status	Birthdate	Age	Grade	Gender	HH Last Name	HH First Name	HH Address 1	HH Address 2
John	Jane	(U) Active		0 yrs 9 mos		(M) Selected	John		123 Main Street	
John	Jane	Active		0 yrs 9 mos			John		123 Main Street	

**Note:** Individual tournaments will skip this customer selection step.

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## Phase 3: All Tournaments cont.

Step 3: Select the applicable tournament sign up button:

- For Contract Tournaments, this will ALWAYS be the button labeled 'Tournament Prepay Contract' and it requires that a customer account be selected.
- For Individual Tournaments, the tournament service item will be found under the 'Individual Tournament Signups' button. Select it like it's a normal sign up.

The following screen will display. Enter in pertinent tournament info and the ENTRE dollar amount to allocate for this tournament. Then hit continue.

**Tournament Prepay Contract (SE7115-16-149-002) for John Doe (Purchase)** i ?

**Questions**

Golf Tournament Info \* ⓘ  
Local Shopping Mart Tournament

**Fees**

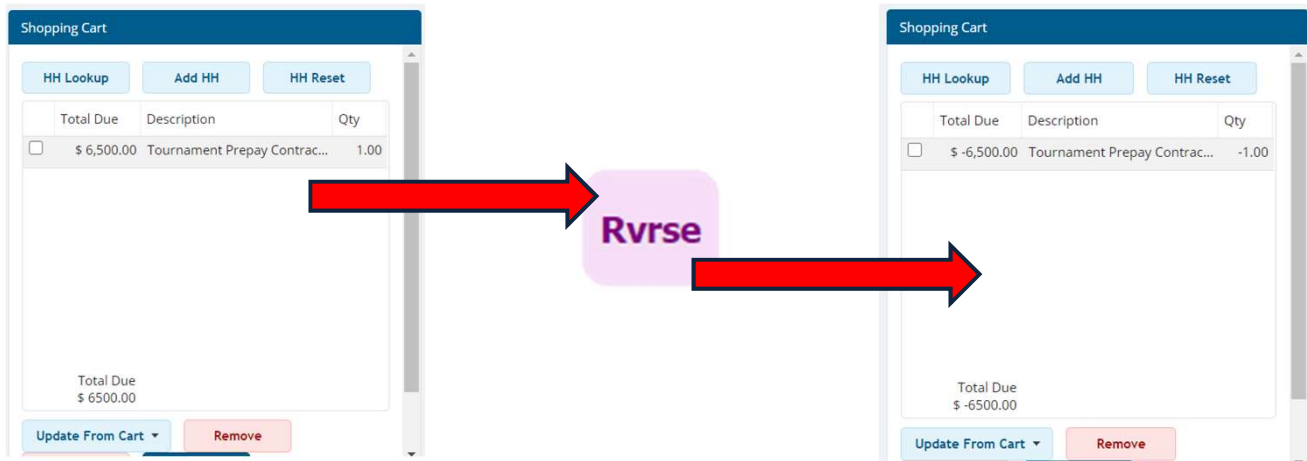
Manual Fees - Select a Maximum of 99999 Fee(s)

Add	Line	Description	Amount	Discount	Quantity	Time Count	Net Fee
<input checked="" type="checkbox"/>	6779372	Default Golf Tour Contact Prepay	6,500.00	0.00	1.00	1.00	6500.00

**Continue** **Cancel**

**Note:** Individual tournaments will not have the 'Golf Tournament Info' field.

Highlight the entry in the shopping cart and then hit the 'Reverse' button on the touch screen. This will change the amount to a negative, backing it out of unearned revenue.



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## Phase 3: All Tournaments cont.

Step 4: Ring up the appropriate revenue amounts into each revenue bucket using the tournament buttons provided. In our example we will allocate the \$6500 paid for the tournament as follows:

- \$2200 – Tournament Rounds Revenue
- \$2000 – Tournament Carts Revenue
- \$1800 – Tournament Food Revenue
- \$500 – Gift Certificate Prizes



Once a button is selected a window similar to the following will display:

**Tournament Rounds Revenue (SE7115-16-169-002) for John Doe (Purchase)** i ?

Fees

Manual Fees - Select a Maximum of 99999 Fee(s)

Add	Line	Description	Amount	Discount	Quantity	Time Count	Net Fee
<input checked="" type="checkbox"/>	6835537	Default Golf Tour Rounds	2,200.00	0.00	1.00	1.00	2200.00

Each button functions in the same way. Enter in the amount to allocate to this revenue bucket and hit continue. In my example, 'Tournament Round Revenue' is \$2200. Repeat this process for all other revenue buckets and also for any gift certificates being issued for this tournament.

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## Phase 3: All Tournaments cont.

**Note:** When selling gift certificates as prizes for a tournament, chances are there will be many that need to be entered and many that have the same value. To expedite this process follow these steps:

- Sell one GC for the applicable amount and enter in the name of the tournament in the 'Daily Name' field.
- Once that is in the shopping cart, select it and then use the 'Update From Cart -> Change Item/Quantity' option to update the number of GC's at this value that need to be issued.

Change Item/Quantity  
Update Bill From Cart  
Update Fees from Cart  
Update From Cart ▾

Once completed, the shopping cart should look similar to the following screenshot. The total sale amount should net to ZERO (\$0).

**Shopping Cart**

HH Lookup   Add HH   HH Reset

	Total Due	Description	Qty
<input type="checkbox"/>	\$ -6,500.00	Tournament Prepay Contrac...	-1.00
<input type="checkbox"/>	\$ 2,200.00	Tournament Rounds Reven...	1.00
<input type="checkbox"/>	\$ 2,000.00	Tournament Carts Revenue ...	1.00
<input type="checkbox"/>	\$ 1,800.00	Tournament Food (SE7115-1...	1.00
<input type="checkbox"/>	\$ 350.00	Glen Eagle Gift Cert (SE7115...	1.00
<input type="checkbox"/>	\$ 150.00	Glen Eagle Gift Cert (SE7115...	1.00

**Total Due**  
\$ 0.00

Update From Cart ▾   Remove

Empty Cart   Finish   \$0.00 Payment

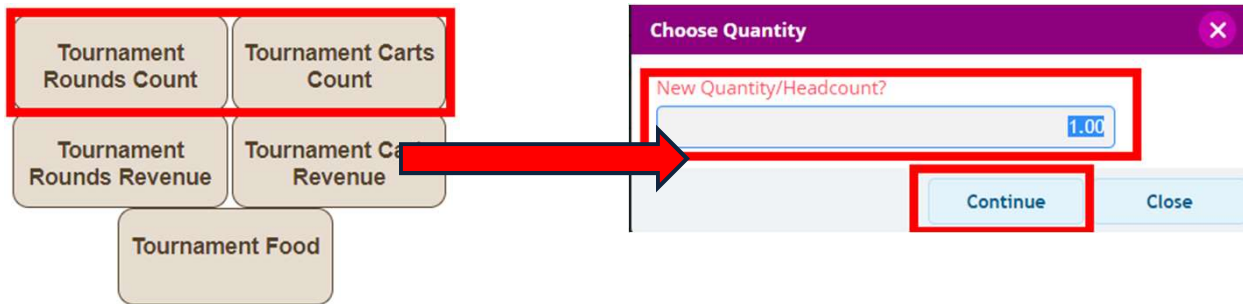
# RECTRAC 3.1 GOLF TOURNAMENT SALES



## Phase 3: All Tournaments cont.

Step 5: Ring in the round and cart (rider) counts using the supplied buttons. These are the counts that will flow into the Golf Dashboard used for statistical reporting.

Each button functions in the same way. Once pressed, a 'Choose Quantity' window will appear. Enter in the count for each bucket and hit continue. Repeat for each bucket.



Once finished, the shopping cart should look similar to the below screenshot. Now click on 'Finish' to complete the transaction. A receipt will print and so will any gift certificates being sold.

**Note:** If there is a balance due on completion of the tournament, you will be taken to the payment screen to process a payment.

