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**LAST UPDATED:**  
7/21/2023

# RecTrac 3.1 Golf Membership Changes/Cancellations

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# RecTrac 3.1 Golf Membership Changes/Cancellations



## RecTrac 3.1 Golf Membership Changes/Cancellations - Overview

Any changes or cancellations to existing golf memberships are processed through Global Sales in RecTrac 3.1. Follow these steps to cancel or change a current customers membership.

Step 1: Access the menu button in the upper left and select 'Global Sales' under the Home menu. This will take you to a Global Sales Lookup screen.

The screenshot shows the RecTrac 3.1 interface. In the top left, a menu button (a 3x3 grid of dots) is highlighted with a red box. A red arrow points from this button to the 'Global Sales' option in the 'Home' menu, which is also highlighted with a red box. Below the menu, the 'Global Sales Lookup' screen is shown. A red box highlights the 'Lookup' dropdown menu containing the text 'smithjohn'. A red arrow points from the 'Global Sales' menu option down to the 'Global Sales Lookup' screen. At the bottom right of the screen, a 'Select' button is highlighted with a red box. The main content area displays a 'Family Member Datagrid' with one row of data:

Last Name	First Name	Status	HH Address 1	HH Address 2	HH City	HH State	HH Zip	HH Email Address	HH Phone No
Smith	John	(1) Active	123 Main Street		Here	FL	123456	noemail@noemail.com	(901)874-5555

Once on the lookup screen, enter in the customers last name into the 'Lookup' box, then click search. Once the correct customer account is found, highlight them and click select in the lower right.

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## RecTrac 3.1 Golf Membership Changes/Cancellations cont.

Step 2: Once on the Global Sales screen for the correct customer, click on the 'Purchase History' tab. Then highlight the customers membership that needs to be cancelled or changed and select the appropriate change or cancel option down below.

### Global Sales for Smith (423)

Tran Date	Module	Description	First Name	Status	Total Due	Total Paid
03/16/2021	PM	AD E1-E5 10 Punch	John	Active	0.00	120.00
03/16/2021	PM	AD E1-E5 Yearly All Inc Mem...	John	Active	0.00	2,000.00

Change gives you the following options. Use 'Change/Transfer Item' to make any changes to the membership.

Cancel gives you the following options. Use 'Cancel Selected Items' to process a cancellation for the selected membership and generate a refund. .

- Change/Transfer Item
- Change Question Answers
- Update Status/Tickler

- Cancel Selected Items
- Bulk Cancellation for Daycare, Facility, Court

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## RecTrac 3.1 Golf Membership Changes/Cancellations cont.

Step 3: Depending on which option you choose, the following screens/options will happen.

**Changing a Membership:** The following screen will display when you click 'Change' and select 'Change/Transfer Item'.

AD E1-E5 Yearly All Inc Mem (614) for John Smith

**Item Changes**

Pass ⓘ	SE7115-16-174-004
Member Begin Date ⓘ	03/02/2021
Expiration Date ⓘ	03/18/2021
Punch Visits Sold ⓘ	0.0

**Continue** **Cancel**

Manager override privileges are required to edit any of the current membership dates or punch visits sold (if it's a punch pass).

Make any adjustments needed and then select 'Continue. Proceed to Step 4.

**Cancelling a Membership:** The following screen will display when you click 'Cancel' and select 'Cancel Selected Items'.

AD E1-E5 Yearly All Inc Mem (614) for John Smith (Cancellation)

Effective Cancel Date ⓘ

**Continue** **Cancel**

Enter in the 'Effective Cancel Date' for this membership. This is typically the current date. This date will determine the proration amount for the refund. After entering that, click continue and proceed to Step 4.

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### RecTrac 3.1 Golf Membership Changes/Cancellations cont.

Step 4: The shopping cart will show the membership that is being changed or cancelled. If there is a refund to be given, click 'Refund' and process the refund. Otherwise, click payment to finish the transaction. See below for an example of a membership being cancelled early and generating a refund.

#### Shopping Cart

	Description	First Name	Total Amount	Previous Paid
<input type="checkbox"/>	AD E1-E5 Month Member (1...	John	\$ 30.97	\$ 60.00

Total Amount \$ 30.97      Previous Paid \$ 60.00

[Remove](#)   [Empty Cart](#)   [Cart Options](#) ▼   [\\$29.03 Refund](#)