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RECTRAC 3.1 LOCKER RESERVATIONS

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RecTrac 3.1 Locker Reservations



Locker Reservations

For a standard locker reservation, there are two main parts of locker reservation process.

- The Reservation
- The Return

Unlike the pass module where the pass expires and is automatically no longer valid, RecTrac assumes the customer is still using the locker if it's overdue.

For example, Joe Smith reserves locker number 123 from 5/1/2021 – 5/1/2022. Today is 5/13/2022 so his locker is 13 days overdue. He has already moved his stuff out of the locker and is no longer using it. If nothing is done in RecTrac to return the locker, locker number 123 will not be available to the next customer.

Reserving a Locker

Step 1: In Global Sales, look up the customer's last name. If they don't already exist in the system, click the "Add" button in the bottom left to add a new household account.

The screenshot shows the 'Global Sales Lookup' interface. At the top, there are tabs for 'Global Sales Lookup', 'TouchScreen - No Household', and 'SuperGrid - No'. Below the tabs, the title 'Global Sales Lookup' is displayed. A search bar contains the text 'read'. Below the search bar, there are options for 'Options', 'Templates', '(1)', and 'Refresh'. A table displays the search results with columns for Last Name, First Name, Status, HH Address 1, and HH Address 2. The first row is highlighted in blue and shows 'Read', 'Billy', 'Active', and '400 Arcaro Way'. The second row shows 'READ', 'GEOFFREY', 'Active', and '400 Arcaro Way'.

Last Name	First Name	Status	HH Address 1	HH Address 2
Read	Billy	Active	400 Arcaro Way	
READ	GEOFFREY	Active	400 Arcaro Way	

If the customer already exists in the system, double click their name or highlight the customer and click the "Select" button in the bottom right. If you had to create a new household, you will be brought to the next step automatically after their information is saved.

RecTrac 3.1 Locker Reservations



Reserving a Locker cont.

Step 2: You should now be in the main Global Sales screen. Click the "Locker" tab.

Global Sales for READ (6)

Global Sales

Activity Touch Super Grid Facility Standard Pass Punch Pass POS Service POS Inventory Rental Item **Locker** Current Locker Visit Purchase H >

Locker Room ⓘ
East Men's Locker Room

Locker Begin Date ⓘ
05/13/2022

Locker End Date ⓘ
05/13/2023

Features ⓘ
(0) Selected

Locker Features Option ⓘ
Ignore Features

Include WaitListed Lockers ⓘ

Search Available Lockers

Step 3: Select which locker room they'd like to reserve a locker in. Then select the date range they want to reserve the locker for.

Global Sales

Activity Touch Super Grid Facility Standard Pass Punch Pass POS Service POS Inventory Rental Item **Locker** Current Locker Visit Purchase H >

Locker Room ⓘ
East Men's Locker Room

Locker Begin Date ⓘ
05/13/2022

Locker End Date ⓘ
05/13/2023

Locker Features Option ⓘ
Ignore Features

Include WaitListed Lockers ⓘ

Options Templates (0) Refresh

Lockers 1 to 7 of 781

Locker Room	Locker Code	Short Description	Condition	Facility Locati...	Features	Price	Default Mi
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Note: Depending on your locker room, you may have Half Lockers vs Full Lockers or another size option. If the customer wants one of those options, click the "Features" drop down and select their preference. Change the "Locker Features Option" to "Any Feature".

Global Sales

Activity **Touch** Super Grid Facility Standard Pass Punch Pass POS Service POS Inventory Rental Item Current

Locker Room ⓘ
East Men's Locker Room

Locker Begin Date ⓘ
05/13/2022

Locker End Date ⓘ
05/13/2023

Features ⓘ
(1) Full

Locker Features Option ⓘ
Any Feature

Include WaitListed Lockers ⓘ

Search Available Lockers

RecTrac 3.1 Locker Reservations



Reserving a Locker cont.

Step 4: Click "Search Available Lockers". The results below will show all available lockers based on the search criteria.

Global Sales

Activity Touch Super Grid Facility Standard Pass Punch Pass POS Service POS Inventory Rental Item Current Rental Locker Current Locker Visit Purchase H

Locker Room (i) East Men's Locker Room
Locker Begin Date (i) 05/13/2022
Locker End Date (i) 05/13/2023
Features (i) (1) Half
Locker Features Option (i) Any Feature
 Include WaitListed Lockers (i)

Search Available Lockers

Options Templates (1) Refresh Lockers 1 to 7 of 780

Locker Room	Locker Code	Short Description	Condition	Facility Locati...	Features	Price	Default M
<input type="checkbox"/>	ND7557-17-180...	0517	East Men's Locker Room	Good	ND7557-LOC	Half	
<input checked="" type="checkbox"/>	ND7557-17-180...	0518	East Men's Locker Room	Good	ND7557-LOC	Half	
<input type="checkbox"/>	ND7557-17-180...	0519	East Men's Locker Room	Good	ND7557-LOC	Half	
<input type="checkbox"/>	ND7557-17-180...	0520	East Men's Locker Room	Good	ND7557-LOC	Half	
<input type="checkbox"/>	ND7557-17-180...	0521	East Men's Locker Room	Good	ND7557-LOC	Half	
<input type="checkbox"/>	ND7557-17-180...	0522	East Men's Locker Room	Good	ND7557-LOC	Half	
<input type="checkbox"/>	ND7557-17-180...	0523	East Men's Locker Room	Good	ND7557-LOC	Half	

Note: If a locker you're expecting to be available is not listed but you know should be available, chances are the locker hasn't been returned in RecTrac yet and RecTrac is assuming the previous renter is still occupying the locker. The locker must be returned by the previous customer to be able to be rented to the next customer.

Step 5: Select the locker they'd like to rent and click the "Add to Cart" button.

<input type="checkbox"/>	ND7557-17-180...	0521	East Men's Locker Room	Good	ND7557-LOC	Half	
<input checked="" type="checkbox"/>	ND7557-17-180...	0522	East Men's Locker Room	Good	ND7557-LOC	Half	
<input type="checkbox"/>	ND7557-17-180...	0523	East Men's Locker Room	Good	ND7557-LOC	Half	

Add To Cart

RecTrac 3.1 Locker Reservations



Reserving a Locker cont.

Step 6: Depending on your fee structure, you may be prompted for a fee to charge. Select the appropriate fee by checking the "Add" toggle. Then click "Continue":

Add	Line	Description	Amount	Discount	Quantity	Time Count	Net Fee
<input checked="" type="checkbox"/>	173590247	E1-E5 12 Months	36.00	0.00	1.00	1.00	36.00
<input type="checkbox"/>	173590249	Other 12 Months	40.00	0.00	1.00	1.00	40.00

Step 7: The Locker will be added to the cart. Click the "\$XX.XX Payment" Button in the bottom right and process a payment to complete the transaction.

Description	First Name	Total Amount	Previous Paid	Total Due
East Men's Locker Room; 0...	GEOFFREY	\$ 36.00	\$ 0.00	\$ 36.00

Total Amount \$ 36.00 Previous Paid \$ 0.00 Total Due \$ 36.00

RecTrac 3.1 Locker Reservations



Returning a Locker

As mentioned in the beginning of this document, a locker will expire based on the Locker End Date but RecTrac assumes the customer is still using the locker even if it's overdue. When a customer says they no longer need the locker anymore or if the customer has disappeared and cleared out their locker, it will need to be returned to open it up for the next customer.

Step 1: In Global Sales, look up the customer and select them. Once the main screen of Global Sales opens up, select the "Current Locker" tab.

Global Sales for READ (6)

Global Sales

Activity Touch Super Grid Facility Standard Pass Punch Pass POS Service POS Inventory Rental Item Current Rental Locker **Current Locker** Visit Purchase H

Options Templates (1) Refresh Current Lockers 1 to 1 of 1

Locker Room	Locker	Description	Locker Type	Status	Total Amount	First Name	Begin Date	End Date
ND7557-17-180...	0522	East Men's Locker Room; 0...	Half	Rented	\$ 36.00	GEOFFREY	05/13/2022	05/13/2023

Step 2: Select the locker that they are returning and click the "Complete Locker Rental" button. The locker will be added to the cart. Click the "\$0.00 Payment" button or click "Cart Options" → "Finish" to finish the sale and complete the locker rental. This locker will now be open for the next patron.

Note: If you charge a damage deposit, you will be able to refund the damage deposit at this point.

Shopping Cart

Description	First Name	Total Amount	Previous Paid	Total Due
<input type="checkbox"/> East Men's Locker Room; 0...	GEOFFREY	\$ 36.00	\$ 36.00	\$ 0.00

- Change From Cart
- Create Bill From Cart
- Finish**
- Pop Cash Drawer
- Update Bill From Cart
- Update Fees from Cart

Remove Empty Cart Cart Options \$0.00 Payment

RecTrac 3.1 Locker Reservations



Returning a Locker with Changes

If a customer is returning a locker early or late, you may need to refund them or charge them additional fees.

Step 1: Under the "Current Locker" tab in Global Sales, select the locker they are returning and click "Complete Locker with Changes."

Global Sales for READ (6)

Locker Room	Locker	Description	Locker Type	Status	Total Amount	First Name	Begin Date	End Date
ND7557-17-180...	0522	East Men's Locker Room; 0...	Half	Rented	\$ 36.00	GEOFFREY	05/13/2022	05/13/2023

Step 2: Change the "Locker End Date" to the new effective locker end date. Typically that would be "today". Click "Continue."

Item Changes

Locker: ND7557-17-180-ME2_0522

Locker Begin Date: 05/13/2022

Locker End Date: 05/13/2023

Date Picker: May 2023

Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

RecTrac 3.1 Locker Reservations



Returning a Locker with Changes cont.

Step 3: Depending on your fee structure, you may be prompted for a fee. If so, adjust the fee accordingly. If they are returning the locker early, you can reduce the fee. If they are returning late, increase the fee. Then click "Continue".

Note: If you are not prompted for a fee change but one is required, select the locker that's in the shopping cart and click "Cart Options" → "Update Fees From Cart".

Note: The fee may automatically adjust based on the new end date selected. This all depends on whether you charge a monthly/flat yearly fee or otherwise.

Fees

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

Add	Line	Description	Amount	Discount	Quantity
<input checked="" type="checkbox"/>	173593376	E1-E5 12 Months	18.00	0.00	1.00
<input type="checkbox"/>	173593378	Other 12 Months	40.00	0.00	1.00

[Continue](#) [Cancel](#)

In this example, the fee paid was \$36.00 for the year but they are leaving after 6 months, So I changed the fee to \$18.00. This will issue a refund for \$18. If the customer owed more money, I could increase the fee to \$40 or whatever amount and they'd have to pay the difference (\$4.00).

Step 4: The cart will look something like the example below. The top line is what was paid previously, the bottom line is the new fee. An \$18.00 Refund shows in the bottom right. Click that button to issue a refund and complete the locker changes.

Shopping Cart

Description	First Name	Total Amount	Previous Paid	Total Due
<input type="checkbox"/> East Men's Locker Room; 0...	GEOFFREY	\$ 0.00	\$ 36.00	\$ -36.00
<input type="checkbox"/> East Men's Locker Room; 0...	GEOFFREY	\$ 18.00	\$ 0.00	\$ 18.00

Total Amount: \$ 18.00 Previous Paid: \$ 36.00 Total Due: \$ -18.00

[Remove](#) [Empty Cart](#) [Cart Options](#) [\\$18.00 Refund](#)

RecTrac 3.1 Locker Reservations



Renew a Locker Reservation

If you have a current renter that needs to renew for another month, six months, year or otherwise, you can easily do that.

Step 1: In Global Sales, search for the customer's last name and select their household. Click the "Current Locker" tab.

Global Sales for READ (6)

Locker Room	Locker	Description	Locker Type	Status	Total Amount	First Name	Begin Date	End Date
ND7557-17-180...	0522	East Men's Locker Room; 0...	Half	Rented	\$ 36.00	GEOFFREY	05/13/2022	05/13/2023

Step 2: Select the locker in the data grid that they want to renew. Click "Renewal" in the bottom left. Adjust the date to when they want to renew to. If they are renewing early, RecTrac will renew from their current scheduled end date. Click "Continue".

East Men's Locker Room; 0522 for GEOFFREY READ

Item Changes

Locker ⓘ

Locker Begin Date ⓘ

Locker End Date ⓘ

Step 3: The locker renewal will be added to the shopping cart. Click "XX.XX Payment" in the bottom right to pay for the renewal and complete the transaction.

RecTrac 3.1 Locker Reservations



Canceling a Locker Reservation

There should be very few instances where you need to cancel a locker reservation. Most often, the customer is leaving early. In that case, you'd return the locker (see instructions on page 6). You would only **cancel** a locker reservation **IF** the reservation hasn't started yet.

For example, your pool has a locker room and the pool is only open in the summer. A customer reserves a locker at the pool in March. Summer comes along and they decide they don't need it, you'd cancel the reservation at that point because they never used it.

Step 1: In Global Sales, look up the customer's last name and select them. In the main Global Sales screen, select the "Purchase History" tab. Depending on your screen you may need to use the arrows to move the tabs over.

Global Sales for READ (6)

The screenshot shows the Global Sales interface for customer READ (6). The 'Purchase History' tab is selected in the top navigation bar. Below the navigation bar, there are options for Templates and Refresh. The main table has columns: Tran Date, Module, Description, First Name, Status, Total Due, Total Paid, Current Receipt, and Begin Date. The status is currently set to '(36) Active...'. An arrow points from the text above to the 'Purchase History' tab.

Step 2: Find the current locker reservation you wish to cancel. Depending on how many transactions the customer has done, it may help to change the Module column to "Locker." That will filter the list to just the customer's locker reservations.

Global Sales for READ (6)

The screenshot shows the Global Sales interface for customer READ (6) with the 'Module' column filtered to 'Locker'. The status is '(1) Locker...'. The table shows two transactions:

Tran Date	Module	Description	First Name	Status	Total Due	Total Paid	Current Receipt	Begin Date
05/13/2022	LK	East Men's Locker Room; 0...	GEOFFREY	Complete	0.00	36.00	1481363	05/13/2022
05/13/2022	LK	East Men's Locker Room; 0...	GEOFFREY	Rented	0.00	36.00	1481362	05/13/2022

An arrow points from the text above to the 'Locker' filter in the Module column.

RecTrac 3.1 Locker Reservations



Canceling a Locker Reservation cont.

Step 3: Select the Locker Reservation that's being cancelled and click "Cancel" → "Cancel Selected Item"

Global Sales for READ (6)

The screenshot shows the 'Global Sales' interface with a navigation bar at the top containing: < Ich Super Grid Facility Standard Pass Punch Pass POS Service POS Inventory Rental Item Current Rental Locker Current Locker Visit Purchase History W >. Below the navigation bar is a toolbar with 'Options', 'Templates', '(1)', and 'Refresh'. The main area displays a table titled 'Purchases' with 10 columns: Tran Date, Module, Description, First Name, Status, Total Due, Total Paid, Current Receipt, and Begin Date. The table contains two rows. The second row is selected and highlighted in blue. Below the table is a horizontal scroll bar and a row of buttons: Update Fees, Change, Cancel, Pay Balance, Process, Reprint, and Notes. An arrow points from the 'Cancel' button in the table to the 'Cancel' button in the bottom toolbar.

Tran Date	Module	Description	First Name	Status	Total Due	Total Paid	Current Receipt	Begin Date
05/13/2022	LK	East Men's Locker Room; 0...	GEOFFREY	Complete	0.00	36.00	1481363	05/13/2022
05/13/2022	LK	East Men's Locker Room; 0...	GEOFFREY	Rented	0.00	36.00	1481362	05/13/2022

Step 4: The cancelled locker reservation will be added to the cart in the bottom right and you'll be able to click the "\$XX.XX Refund" button to issue a refund. This will also make the locker available for the next customer.

RecTrac 3.1 Locker Reservations



Transferring to a Different Locker

If a customer wants to move from one locker to another, you can easily do that in Global Sales.

Step 1: In Global Sales, look up the customer's last name and select them. In the main Global Sales screen, select the "Purchase History" tab. Depending on your screen you may need to use the arrows to move the tabs over.

Global Sales for READ (6)

Global Sales

← ich Super Grid Facility Standard Pass Punch Pass POS Service POS Inventory Rental Item Current Rental Locker Current Locker Visit **Purchase History** W →

Options Templates (1) Refresh Purchases 1 to 10 of 10 (Filtered from 10)

Tran Date	Module	Description	First Name	Status	Total Due	Total Paid	Current Receipt	Begin Date
	(0) Selected			(36) Active...				

Step 2: Find the current locker reservation you wish to transfer. Depending on how many transactions the customer has done, it may help to change the Module column to "Locker." That will filter the list to just the customer's locker reservations.

Global Sales for READ (6)

Global Sales

← ich Super Grid Facility Standard Pass Punch Pass POS Service POS Inventory Rental Item Current Rental Locker Current Locker Visit **Purchase History** W →

Options Templates (1) Refresh Purchases 1 to 2 of 2 (Filtered from 10)

Tran Date	Module	Description	First Name	Status	Total Due	Total Paid	Current Receipt	Begin Date
	(1) Locker ...			(36) Active...				
<input type="checkbox"/>	05/13/2022	LK	East Men's Locker Room; 0...	GEOFFREY	Complete	0.00	36.00	1481363 05/13/2022
<input checked="" type="checkbox"/>	05/13/2022	LK	East Men's Locker Room; 0...	GEOFFREY	Rented	0.00	36.00	1481362 05/13/2022

RecTrac 3.1 Locker Reservations



Transferring to a Different Locker cont.

Step 3: Select the locker the customer is transferring from in the data grid and click "Change" → "Change/Transfer Item."

The screenshot shows the 'Global Sales' interface with a data grid. The grid has columns for Tran Date, Module, Description, First Name, Status, Total Due, Total Paid, and Current. Two rows are visible: one for a 'Complete' status and one for a 'Rented' status. The 'Rented' row is selected. Below the grid is a toolbar with buttons for 'Update Fees', 'Change', 'Cancel', 'Pay Balance', 'Process', 'Reprint', and 'Notes'. The 'Change' button dropdown menu is open, showing options: 'Change/Transfer Item', 'Change Question Answers', and 'Update Status/Tickler'. An arrow points from the 'Change' button to the 'Change/Transfer Item' option.

Step 4: The Locker Number is the number after the underscore. You can either change the locker number manually or click the Picklist button on the right and select the new locker number on the next screen. Click "Continue".

The 'Item Changes' dialog box contains the following fields:

- Locker (i): ND7557-17-180-ME2_0544
- Locker Begin Date (i): 05/13/2022
- Locker End Date (i): 05/13/2023

Buttons: Continue, Cancel

RecTrac 3.1 Locker Reservations



Transferring to a Different Locker cont.

Step 5: The old and new locker will be in the cart. Click "Cart Options" → "Finish" to finish the locker transfer.

Description	First Name	Total Amount	Previous Paid	Total Due
<input type="checkbox"/> East Men's Locker Room; 0522	GEOFFREY	\$ 36.00	\$ 36.00	\$ 0.00
<input type="checkbox"/> East Men's Locker Room; 0585	GEOFFREY	\$ 0.00	\$ 0.00	\$ 0.00

Total Amount	Previous Paid	Total Due
\$ 36.00	\$ 36.00	\$ 0.00

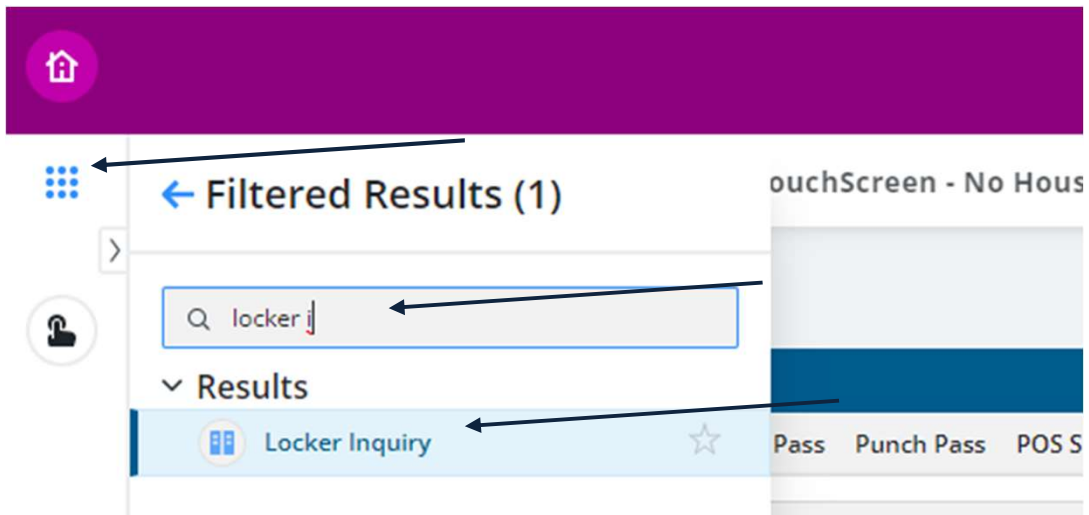
RecTrac 3.1 Locker Reservations



Checking Locker Status

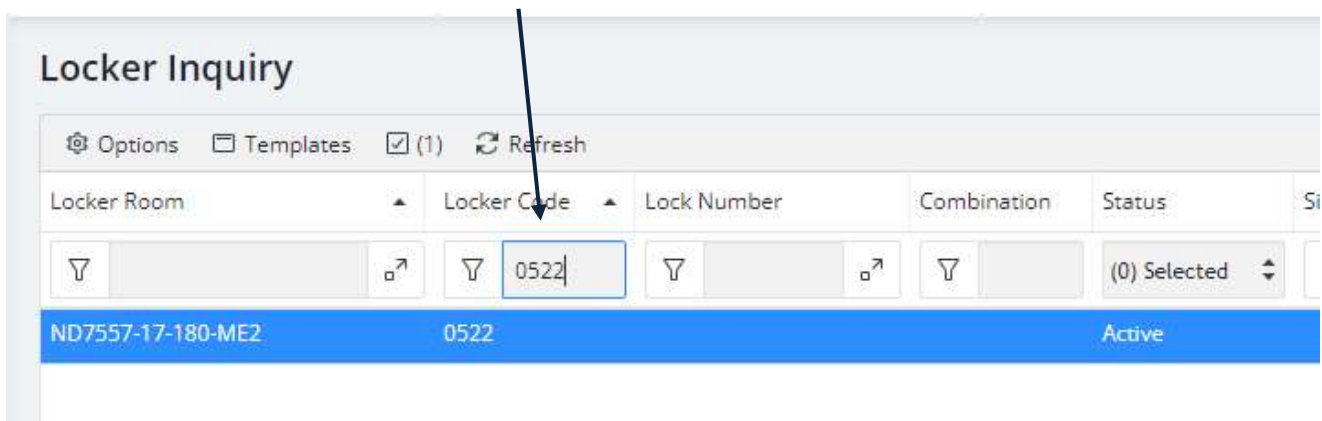
You may need to research who is in a certain locker to figure out why it's not available. Most often the locker expires but it isn't returned in the system so it's not available to the next person.

Step 1: Click the menu nine dot button in the top left and type "Locker Inquiry" Filter Menu box. Select "Locker Inquiry."



Step 2: To find a certain locker number, it's easiest to type in the locker number in the "Locker Code" filter. Keep in mind, your locker numbers might have leading zeros so if you're looking for locker 25, you may need to type 025.

You also might have the same locker number in the men's and women's locker room. The locker room code in the left column determines which locker room you're looking at.



RecTrac 3.1 Locker Reservations



Checking Locker Status cont.

Step 3: Select the locker number in question and then click the "History" button at the bottom.

The screenshot shows a web interface for managing lockers. At the top, there are navigation options: 'Options', 'Templates', a checked box '(1)', and a 'Refresh' button. The main area is titled 'Lockers' and contains a table with columns: 'Locker Room', 'Locker Code', 'Lock Number', 'Combination', 'Status', and 'Site Code'. The 'Locker Code' column has a filter dropdown set to '0522'. Below the table, there are four buttons: 'Detail', 'History', 'Income/Expense', and 'Back'. An arrow points from the 'History' button to the 'Locker Code' filter.

Locker Room	Locker Code	Lock Number	Combination	Status	Site Code
ND7557-17-180-ME2	0522			Active	

Step 4. You will see the history of that locker, what household rented it and the current status. If the status says "Rented", RecTrac believes it is still occupied and it will need to be returned for the customer that is no longer using it.

The screenshot shows a 'Locker Detail Inquiry' page. It has a header with 'Options', 'Templates', a checked box '(0)', and a 'Refresh' button. Below is a table with columns: 'HH ID', 'Last Name', 'First Name', 'Description', 'Locker Room', and 'Locker Code'. The table contains one row of data.

HH ID	Last Name	First Name	Description	Locker Room	Locker Code
6	READ	GEOFFREY	East Men's Locker Room; 0...	ND7557-17-180...	0522