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RECTRAC 3.1 GOLFER ROUNDS REPORT

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RecTrac 3.1 Golfer Rounds Report

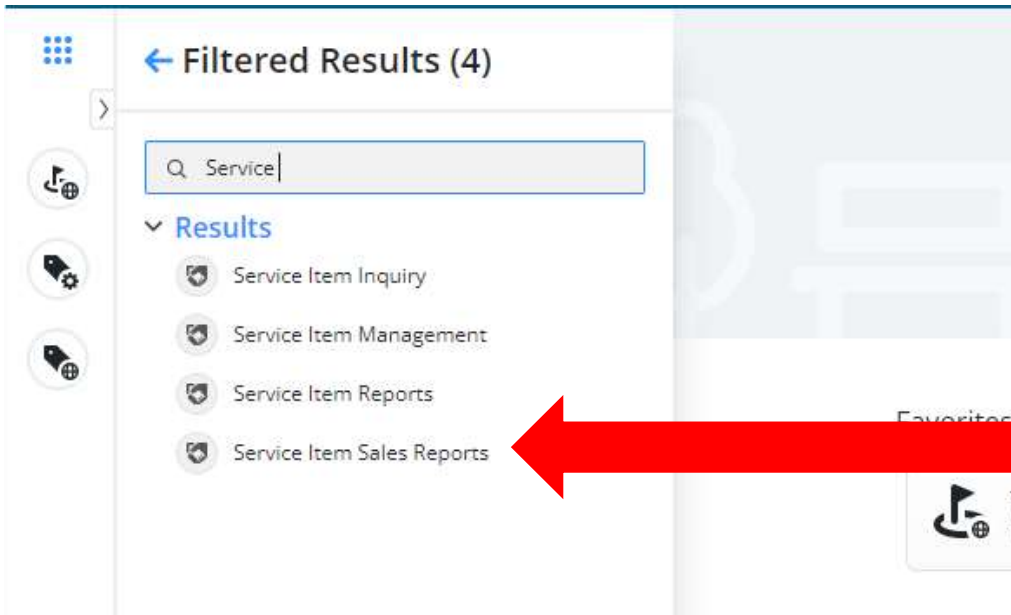


Introduction

This document explains how to run the Golfer Rounds Report in RecTrac 3.1

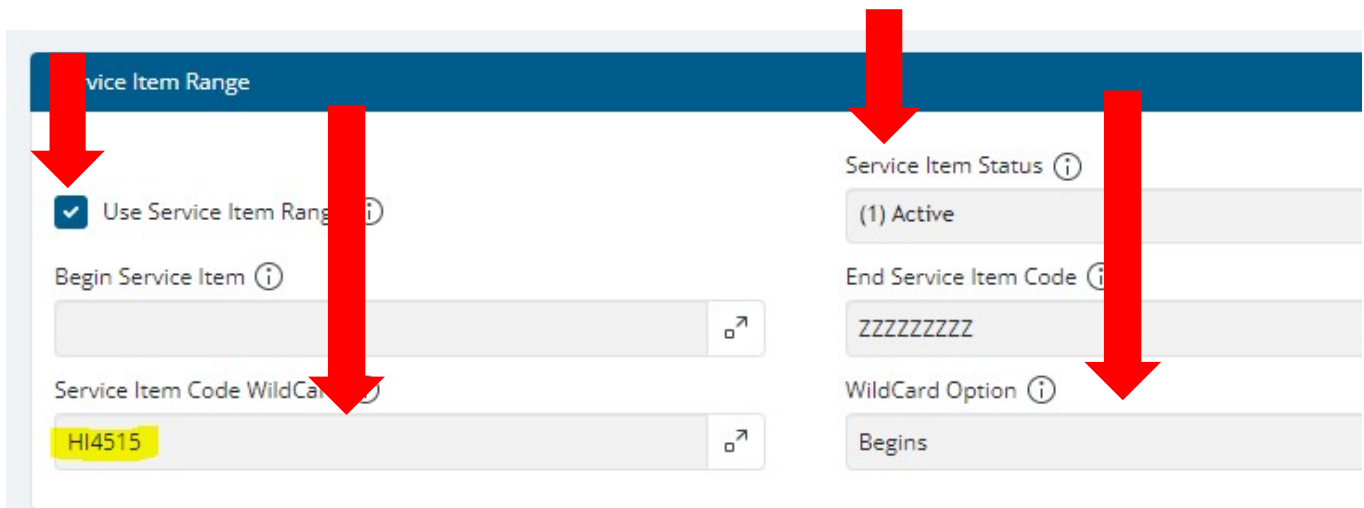
Service Item Sales Reports

1. In the menu on the left, search for Service Item Sales Reports.



2. Click Default Settings in the bottom right (only required the first time you run this report).

3. In the top right, turn on the Use Service Item Range toggle. In the Service Item Code WildCard, type in your 6 digit prefix. Change the Service Item Status to "Active." Change the WildCard Option to "Begins"



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Golfer Rounds Report cont.

4. Under Transaction Filters, turn on "Use Item Original Transaction Date Range." You have a few options when it comes to the date range you want to use. Begin of Month -1 → End of Month -1 will run the report for last month. If you run this report the first couple days of every month, you can use this option and you won't have to change the date range each time you run the report.

Transaction Filters

Use Item Original Transaction Date Range ⓘ

Begin Transaction Date ⓘ
Begin of Month -1

End Transaction Date ⓘ
End of Month -1

Sale Status ⓘ
(1) Sold

You can also use a data range if that's easier or necessary.

Transaction Filters

Use Item Original Transaction Date Range ⓘ

Begin Transaction Date ⓘ
Actual Date 11/01/2021

End Transaction Date ⓘ
Actual Date 11/19/2021

Sale Status ⓘ
(1) Sold

5. Optional. If you are looking for just greens fees and do not want to include cart fees, range balls, lessons etc., change the record type setting under Primary Record Filters (bottom right quadrant) to "Greens Fee".

Primary Record Filters

Record Type ⓘ
(1) Greens Fee

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Golfer Round Report Proof

6. Below is a bird's eye view of the settings mentioned above to double check your setup.

Service Item Range

<input checked="" type="checkbox"/> Use Service Item Range ⓘ	Service Item Status ⓘ (1) Active
Begin Service Item ⓘ <input type="text"/>	End Service Item Code ⓘ ZZZZZZZZ
Service Item Code WildCard ⓘ HI4515	WildCard Option ⓘ Begins

Site Filters

Transaction Filters

<input checked="" type="checkbox"/> Use Item Original Transaction Date Range ⓘ	Sale Status ⓘ (1) Sold
Begin Transaction Date ⓘ Actual Date 11/06/2021	End Transaction Date ⓘ Actual Date 11/19/2021
<input type="checkbox"/> Use Item Original Transaction Time Range ⓘ	
<input type="checkbox"/> Use Quantity Range ⓘ	
Service Item Sale Archived ⓘ (1) No	

Primary Record Filters

Record Type ⓘ (1) Greens Fee

RecTrac 3.1 Golfer Rounds Report



Golfer Rounds Report Cont.

7. In the bottom left, select All Outputs and then the VSI – Golf Rounds Report under output template.

Output Group ⓘ

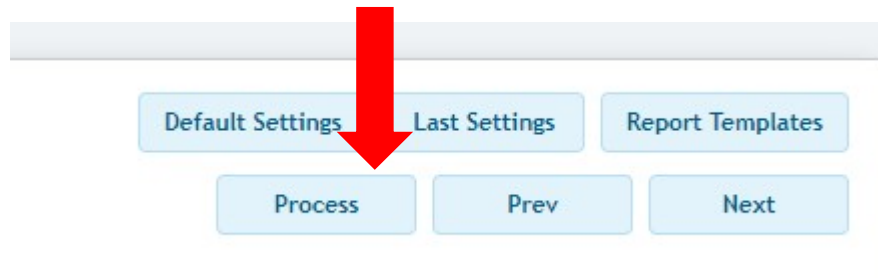
Output Template * ⓘ

8. Optional. Enter a Custom Title in the Custom Title field.

Custom Title ⓘ

Output Type ⓘ

9. Click Process in the bottom right.



10. Select your course(s) in the course list. Select Summary Totals Only. Select Service Item Totals and Weekday Totals. Using these settings will generate a report that's very similar to the RecTrac 10.3 rounds report. Feel free to experiment with other settings to gather more/different data.

Golf Rounds Report Options

Courses to Include (Blank = ALL) ⓘ

Report Option ⓘ

Summary Totals to Include ⓘ

Include Dates with no Round Information? ⓘ

11. Ensure PDF is selected and Preview. Click Continue.