

RecChat – Rules: Tips and Tricks Response

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RecChat – Rules Tips and Tricks

General questions and response

When creating default records, that just means you can select them to be available on the module, correct? It does not automatically add it to any new item in the module, does it?

Correct, default records are available when creating a new item of that type, they will not affect anything that has already been created.

How would we provide for exceptions to rules linked at a higher level?

Most exceptions are best provided for with OrGroups. Please reference the recorded RecChat session, or refer to the in-line help in RecTrac 3.1 for more info on OrGroups.

Do OrGroups apply "in order," i.e. will OrGroup1 apply as a screen before OrGroup4 is considered?

It's better to think of the OrGroup numbers as a way of matching like rules to like. There's no order that's considered in the OrGroup logic, only whether the group code on one rule matches the group code on any other rule involved with that item.

If you have an OrGroup at the Module level (OrGroup1) and I also have an OrGroup at the Facility level, can the one at the Facility Level be OrGroup1 or does it have to be a different number?

It depends on the desired result. If you are making a rule that provides an exception for the higher rule, then you would want to match the OrGroup number. If you want the rule to not provide an exception, then you would want to select an OrGroup with a different number, or leave the OrGroup blank, depending on the scenario.

If you use a particular OrGroup number in one case, does that mean you cannot use the same number for another rule in a separate location?

No, OrGroups are only looking for the same number during a particular transaction, i.e. when adding a specific item to the shopping cart. That means that if you use OrGroup3 for your Pavilion rules, use the same number for Pool Lane reservations would not cause any issues. As a general tip, always evaluate

your rules by looking at the Rules Tab at the item of sale. That is what RecTrac's logic will be evaluating during the Add to Cart process.

Is there a way that rules can affect the way things are displayed on WebTrac? As in a disallow rule will not display for registration?

Yes. On your WebTrac Parameters Profile, there is a Module Search Settings area. Depending on which level of Rule Search Options you have selected, it will display results as available or un-available. The more detailed the Rule search, the more accurate the results, but the more impact you may see on performance. It is best practice to put these to their lowest settings (None) prior to anticipated heavy registration periods.

Note: Rules will always be evaluated when adding items to the cart, regardless of these settings.

Can you make a "not mode" rule for specific hours for a specific day?

Yes. Not mode was created to make creating rules easier. Evaluate whether it's easier to add everything to include or specifying what not to include.

Can you show us the linking level diagrams?

Yes! Here are the Global, Activity, and Facility examples used during the video. We recommend reviewing the video for context:



