Rundoo

GETTING STARTED WITH RUNDOO · SETUP

A Statement, On Demand

> Generate and send one customer's bill the moment they ask.

Step-by-step walkthrough   ~3 min read   Companion to the 3:53 video

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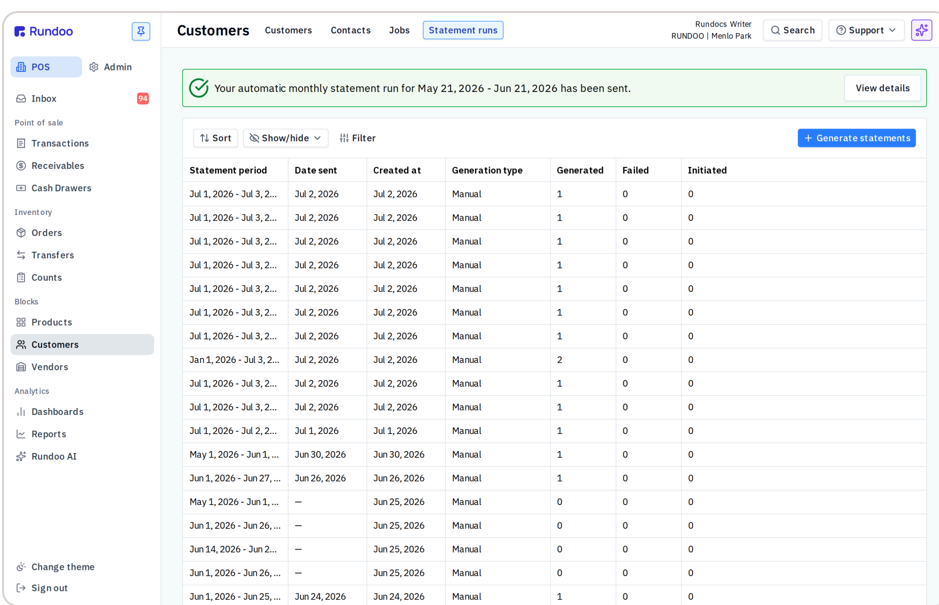
Your phone rings. It's one of your regulars on a charge account, and they need a copy of their statement right now. Good news: you don't have to wait for the end of the month. You can generate and send that one customer's statement on demand, and have it out the door in about two minutes. Here's the whole routine, start to finish.

WHERE YOU'RE HEADED

The Statement runs tab

Everything happens on the **POS** side. Open the **Customers** tab in the left nav, then click **Statement runs** at the top. This is the list of every run you've done, automatic or manual, with the period each one covered and whether it's been sent. A faster way in: type **statement** into the search bar at the top of any screen, and Rundoo takes you right here.



The Statement runs tab. Past runs list down the page; the Generate statements button sits at the top-right.

DO THIS

Generate and send, step by step

1

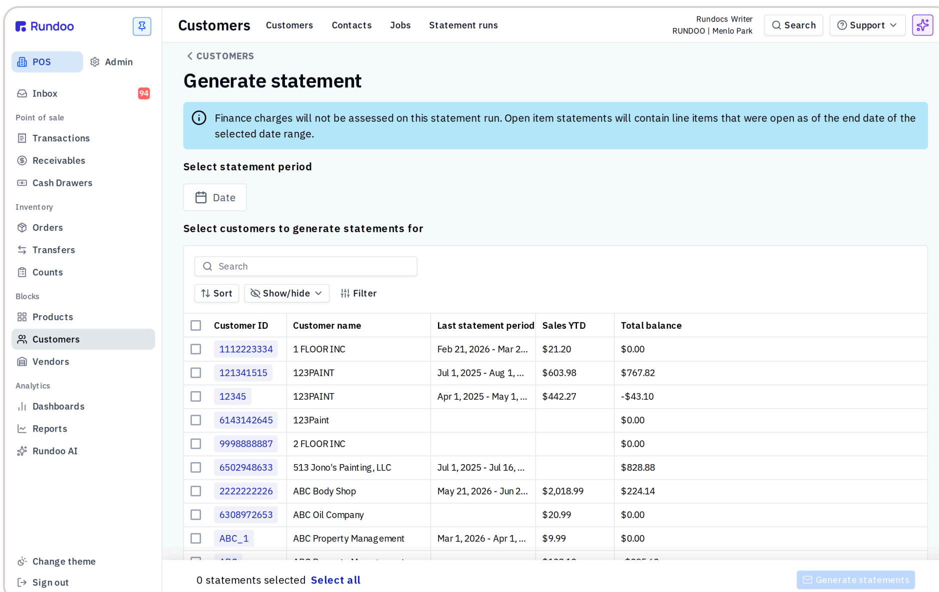
Start a new manual run

Click **+ Generate statements** in the top-right corner. That opens the Generate statement page, where you'll pick the period and the customer.

2

Set the statement period

Under **Select statement period**, click the **Date** picker and set the start and end of the period the statement should cover. One thing worth knowing: when you run a statement by hand like this, Rundoo does not add finance charges. Those are only assessed on your automatic monthly run.



The Generate statement page. Pick the period up top, then find your customer in the table below.

3

Pick the customer who called

In the customer table, type their name into the **Search** box, then check the box next to their row. You could filter the list by finance term, or use **Select all** to bill a whole group, but for a one-off request, just this one customer is all you need.

4

Generate the run

Click **Generate statements** at the bottom-right. Rundoo builds the run and drops you back on the Statement runs tab. Your new run shows up at the top with a Generation type of **Manual**. It can take a moment to process, so hit the refresh icon if you don't see it right away.

5

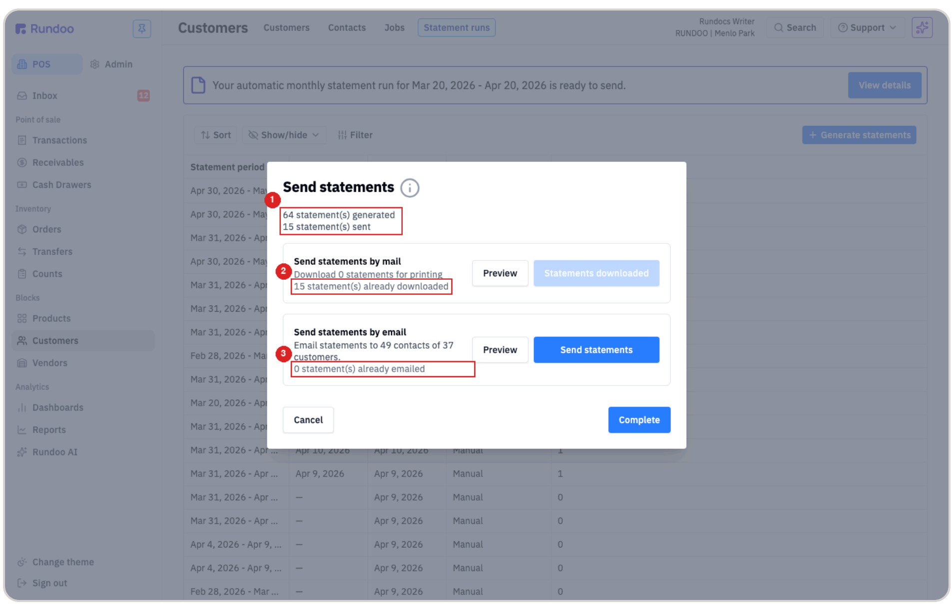
Remember: generating is not sending

This is the step folks trip on most. Building the run does not deliver anything to your customer. It's two separate actions: first you generate, then you send. Nothing has left your store yet.

6

Open the run and send it

Click into the run you just made, check the box next to your customer, and click **Send selected statements**. The **Send statements** window opens with two tracks: send by mail, or send by email. Either way, hit **Preview** first to eyeball the PDF. It's a good habit, and it takes two seconds.



The Send statements window. Preview the PDF, then either download to print and mail, or email it directly.

7

Deliver it the way they want it

Since your customer is on the phone, email is the fast path: under **Send statements by email**, click **Send statements** and it goes straight to the contacts on their file. Prefer paper? Use **Download statements** under the mail track to save a PDF you can print and drop in an envelope.

KEEP IT HANDY

At a glance

WHERE **POS → Customers → Statement runs** Or search "statement" from any screen.	TWO STEPS, ALWAYS **Generate, then send** The run isn't delivered until you send it.
FINANCE CHARGES **Not on a manual run** Those ride only on the automatic monthly run.	DELIVERY **Email or download to print** Preview the PDF before either one.

Good to know

- Only charge-account customers get statements. A customer earns a statement when they carry a statement-based finance term like Net 30 Statement. Setting that up is covered in the "Ready to Bill" video.
- To email a statement, the customer needs at least one contact with an email address on file. No email on file? Download the PDF and print or mail it instead.
- A one-customer run is just a regular run of size one. The same screen handles a whole billing cycle when you're ready for it.
- This is a great one to try in your practice store first. Nothing here touches your real books or sends anything to your actual customers.