Rundoo

GETTING STARTED WITH RUNDOO · UNBOXING

Adding a Customer

Handling regulars, new accounts, and walk-ins.

Step-by-step walkthrough ~3 min read Companion to the 2:36 video

Every ticket starts with the same question: who's at the counter? You already know how to ring up a sale, so this is just about the left side of the transaction screen, the customer panel. In Rundoo you've got three ways to handle whoever walks up. Pull up a regular, set up a brand-new account on the spot, or skip it entirely for a cash-and-go walk-in. Here's each one, without slowing down your line.

WHERE THIS LIVES

Customer on the left, sale on the right

Open **Point of Sale** and then **Transactions** in the left menu, and start on the **New** tab. The screen splits in two. On the left is the customer, who you're selling to. On the right is the sale itself, the cart and the total. That layout never changes, so once it clicks, every transaction feels familiar. Everything below happens on that left panel.

DO THIS

Three ways to handle who's at the counter

1

Pull up a regular

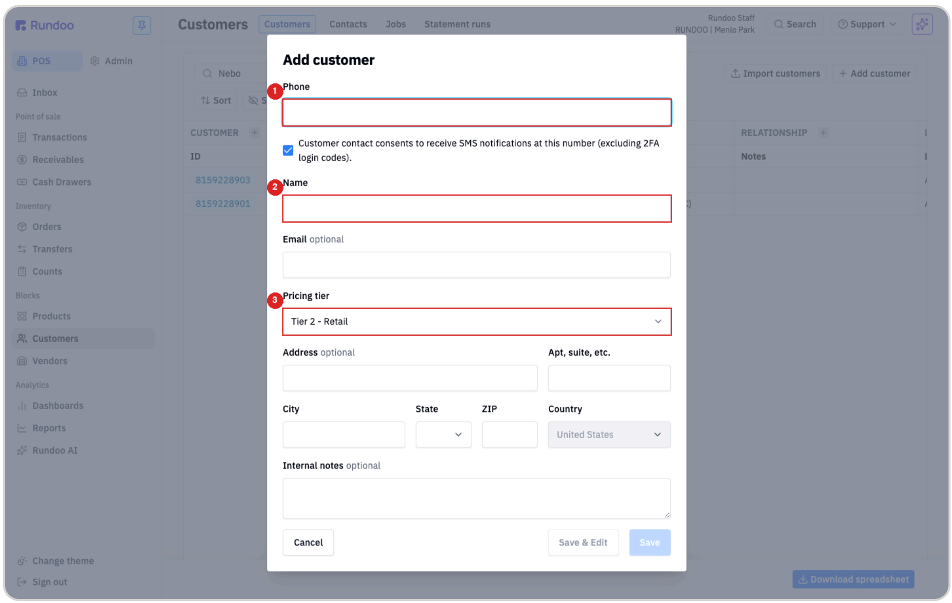
Click into the search bar on the left. You can search by anything on the customer's profile, their name, phone number, or email, so whatever they give you, you can find them. Click the right one and they're attached to the sale.

Watch for any note or sale reminder on the account. It pops right here when you attach them, so things like "who's authorized to charge" or "call before charging on account" catch your eye before you start scanning items.

2 Create a new account on the fly

Not in the system yet? You don't have to leave the sale. Click **Create account** and the new-customer form opens. Enter a **Phone** number and a **Name**, the two fields that matter, so you can move fast at the counter. Email and address are optional; grab them later.

One thing worth setting right now: **Pricing tier**. It defaults to **Tier 2 - Retail**, so if this is a contractor, pick their tier here and their pricing is correct from the very first sale, with no prices to change by hand. Then click **Save** and they drop onto the ticket.



The new-customer form. Phone (1), Name (2), and Pricing tier (3) are the fields that matter; the tier defaults to Tier 2 - Retail.

3 Ring up a walk-in with no account

A quick cash-and-go walk-in who just needs a handful of hardware and no paper trail? Skip the lookup entirely. If a customer is already attached, click the **×** next to their name to clear the panel. Then just start adding items to the ticket and ring it up with no account at all.

KEEP IT HANDY

The new-customer form at a glance

PHONE **Required** Powers search and text receipts.	NAME **Required** Shows on receipts and in the list.
PRICING TIER **Tier 2 - Retail** The default. Change it for contractors.	EMAIL & ADDRESS **Optional** Add now or come back later.

Good to know

- Duplicate phone numbers fail silently. If someone already has that number, the Save click just closes the form with no error and no new customer. Search the list for the phone first if you're not sure.
- Entering a whole stack of customers at once? Use **Save & New** instead of Save. It saves this one and reopens a blank form so you can keep going.
- Setting a regular up to charge on a tab is its own quick walkthrough, Open a House Account. Adding the customer here comes first; that video picks up where this one leaves off.

Try it in your practice store

Pull up a regular, then set up a brand-new account just to get the timing down. Nothing in there touches your real numbers, so you can't break a thing. Next up, we build out the sale itself on the right.