Rundoo

GLANCE CARD

GETTING STARTED WITH RUNDOO · GO-LIVE DATA CHECK

Balances You Can Trust

The most important pre-go-live check: open your top charge accounts, confirm the balance, term, credit limit, and tax status came over right, and flag anything off for your guide.

WHAT TO CHECK ON EACH ACCOUNT

1

Balance & aging

Total outstanding matches what they owe. Aged by due date, not invoice date.

Balance tab

2

Term & credit limit

Term matches what's in writing. The limit is a hard stop at the register.

Settings → Financing

3

Tax-exempt

Exempt accounts point at a custom 0% rate, not a checkbox.

Settings → Tax exemptions

Spot-check in 4 taps

1. Open **Customers**, sort by **Sales YTD**, open a top charge account.
2. On the **Balance** tab, confirm the total outstanding.
3. On **Settings** → **Financing**, check the finance term and credit limit.
4. On **Settings** → **Tax exemptions**, confirm the exempt rate.

Red flags to watch

A blank or too-low credit limit

A balance that's off, or none where you expected a tab (check the finance term). Note it, don't fix it.

Catch, don't fix: flag anything off in the **Ask a question** box under this video. Name the account and what's wrong. Your guide fixes it in your old system so it re-syncs clean the night before go-live.

Expect low totals: preview numbers like **Sales YTD** look low right now. The full history lands with your final data sync.