Rundoo

GETTING STARTED WITH RUNDOO · TRANSACTIONS

Taking Payment (Cash, Card, Check, Charge)

> Ringing up any sale at the counter.

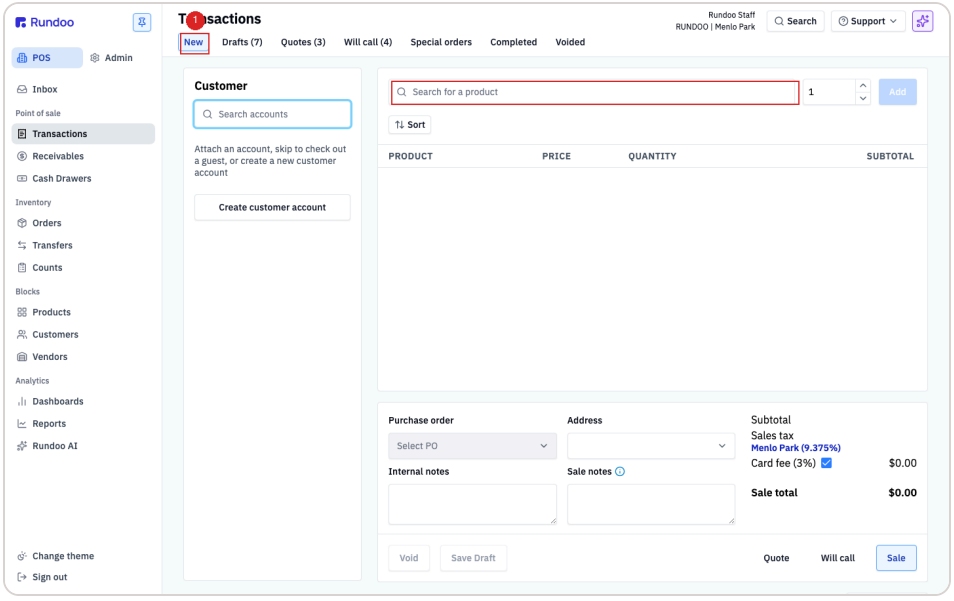
Step-by-step walkthrough ~4 min read Companion to the 4:02 video

A customer walks up to the counter with a handful of items. This is the moment you do more than any other all day, so it pays to have the rhythm down cold. In Rundoo, every sale runs the same way no matter how the customer pays. You build the cart on the right, hit one button, and pick a tender. Cash, card, check, or charge on account all finish from the same panel.

WHERE EVERY SALE STARTS

The Transactions screen

In **POS** mode, open the **Transactions** tab on the left and stay on the **New** top tab. That is the sale builder. The customer goes on the left, and you build the cart on the right. The strip of top tabs, **New**, **Drafts**, **Quotes**, **Will call**, **Special orders**, **Completed**, and **Voided**, is how you jump between carts in progress and work you have already saved.



The New tab is the sale builder. Attach a customer on the left, add items on the right, and finish with the Sale button.

DO THIS

Ring up a sale, step by step

1 Add items to the cart

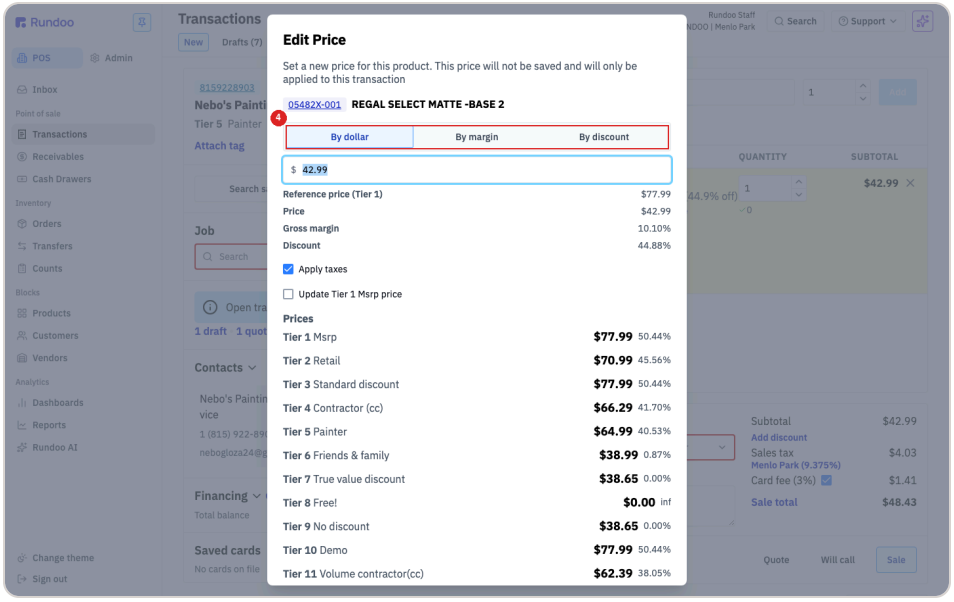
Click **Search for a product** and start typing a name, SKU, or part number. Rundoo finds it, and clicking the right one drops it into the cart. If you use a barcode scanner, click into the search box first and scan away. Scanning the same item again bumps its quantity up by one instead of adding a second line, so a customer buying ten of something is just ten beeps. You can also set the quantity in the stepper next to the search box and click **Add**. Each line shows Product, Price, Quantity, and Subtotal, and the totals on the right update as you go.

2 Attach a customer, or skip it

A plain walk-in cash or card sale does not need a customer at all. If you do want one, click **Search accounts** in the Customer panel and type a name, phone, or customer ID, or click **Create customer account** to build a new one without losing the cart. You need a customer attached to charge on account, to apply their custom pricing, or to have the sale show up on a later statement.

3 Adjust a price when you need to

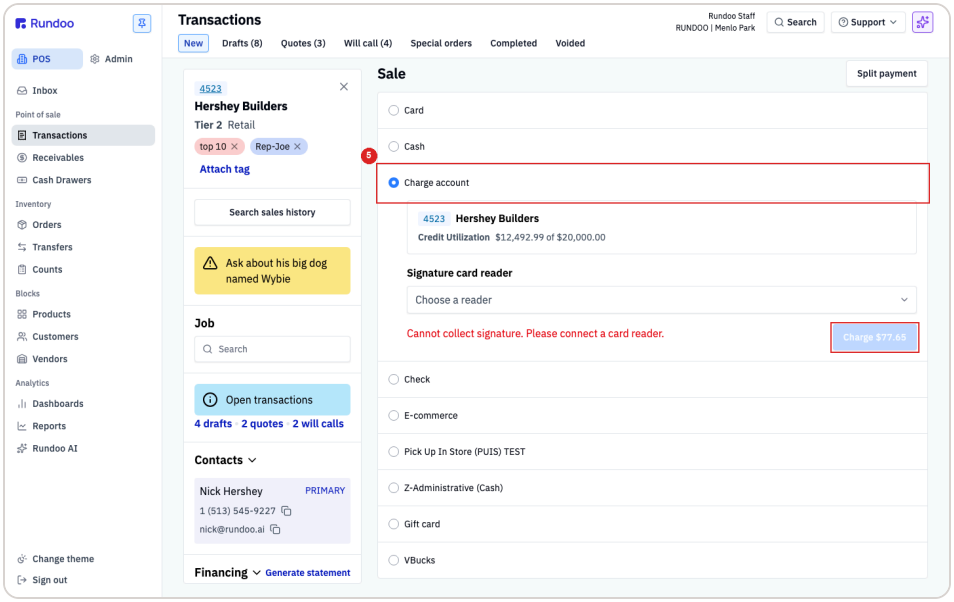
To change a line price for any reason, click **Edit price** on that line. The **Edit Price** box opens with three ways to set it: **By dollar** for a flat new price, **By margin** to work to a target margin, or **By discount** to take a percentage off. Every one of your price tiers is listed right there for reference, so you can price with confidence. The change applies to this sale only. Better yet: when you attach a customer who has a set price tier, like a contractor, Rundoo applies their pricing to every item automatically, so most of the time there is nothing to remember.



Edit Price: set a new price By dollar, By margin, or By discount, with all your tiers shown for reference.

4 Open the payment panel

Once the cart is right and the customer is ready to pay, click the big **Sale** button in the bottom-right corner. The payment panel slides in with your tender methods listed as buttons. **Card** is selected by default, and the rest sit below it. Off to the right is the commit button, a blue **Charge** button whose amount updates live as you enter a payment. That same button finishes every kind of sale.



The payment panel. Card is picked by default, other tenders sit below, and the blue Charge button commits the sale.

5 Pick how they are paying

Card: leave **Card** selected. Click **Choose a reader** and hand the connected reader to the customer to tap, insert, or swipe. For a card on file or a phone order, use **Enter card manually** and type the number, expiration, CVV, and ZIP.

Cash: pick **Cash** and type the amount the customer handed you. Rundoo does the change math against the sale total for you.

Check: pick **Check** and enter the check number and amount. Rundoo logs the number with the sale, which is what keeps your drawer reconciling at close-out.

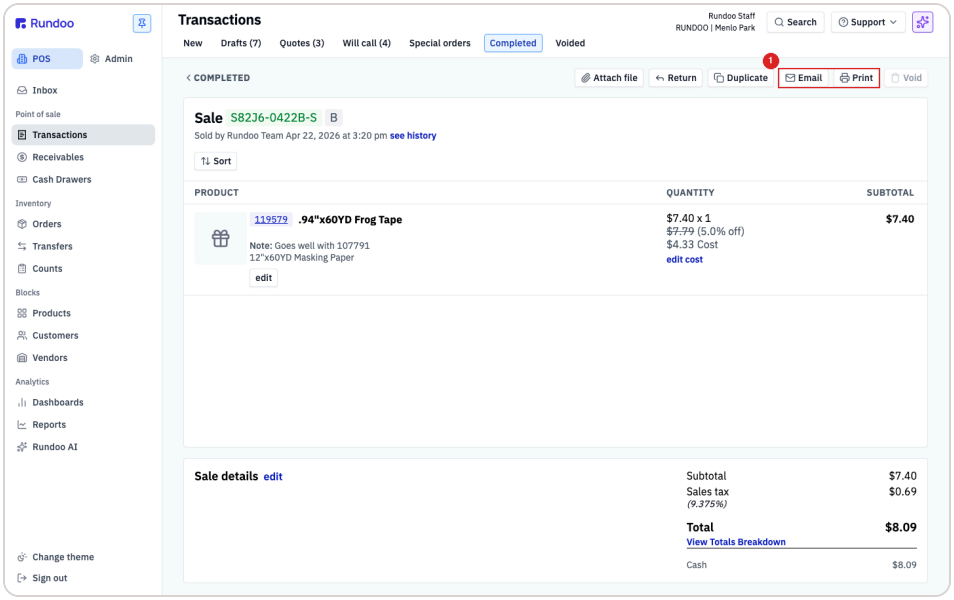
Charge account: for your regulars with a house account, pick **Charge account**. Instead of taking payment now, the sale posts as an invoice on their balance, and you will even see their Credit Utilization before you commit.

6 Finish the sale and hand over the change

Say this one is cash. The total comes to sixty dollars and two cents, and the customer hands you seventy. Type in **70.00** and Rundoo shows the change you owe: nine seventy-seven. Click the **Charge** button to complete it, and on a cash sale the drawer pops so you can make change. Rundoo lands you on the finished-sale screen with the change amount right in front of you.

7 Give them a receipt

From the completed sale, hand over a receipt however the customer wants it. Click **Print** to send a receipt to your counter printer, or **Email** to send a copy to the customer. No customer attached? Rundoo asks for an email address before it sends.



On a completed sale, the Print and Email buttons live at the top right. They are here again any time you reopen the sale.

8 Find any sale again later

Every sale you ring lands in the **Completed** top tab. If a customer comes back for a past receipt, open that tab, search by their name, the date, or who rang it up, and open the sale. The same Print and Email buttons are waiting on the detail view.

KEEP IT HANDY

The four tenders at a glance

CARD

Tap, insert, swipe, or key in

Selected by default. Choose a reader, or enter it manually for phone orders.

CASH

Enter the amount handed over

Rundoo figures the change and pops the drawer.

CHECK

Enter the check number

Logged with the sale so the drawer reconciles at close.

CHARGE ACCOUNT

Put it on their balance

Only shows for a charge customer on the ticket.

Good to know

- No **Charge account** option at payment? That almost always means no charge customer is attached. Back up to the cart and attach the right customer first.
- You do not pick promotions at the counter. Store-wide discounts fire automatically on carts that qualify. Use **Edit price** only for one-off line changes.
- A card charge has to be at least fifty cents. If a tiny sale will not go through on card, take it as cash or another tender.
- Practicing? In your practice store the customers are not really waiting, so ring a cash sale for a walk-in, then attach a contractor account and watch the charge option appear. Nothing you do here touches your real inventory or your books.