Rundoo

GETTING STARTED WITH RUNDOO · TRANSACTIONS

Adding a Customer Credit

> Put a goodwill credit on a loyal customer's account.

Step-by-step walkthrough ~2 min read Companion to the 2:09 video

Sometimes you just want to thank a good customer. Not for a return, not for an overpayment, just a plain gesture of goodwill: fifty dollars on their account, on the house. Rundoo doesn't have an "issue a credit" button, but the way you get there takes about ninety seconds once you know the path. You'll create the credit inside Receivables and tender it as a write-off, which sounds odd until you see it, so let's walk it through.

WHERE THIS LIVES

Receivables is home base

Credits live on the customer's account, and you build a fresh one from the bill-payment screen. In **POS** mode, open **Receivables** in the left menu and stay on the **Payment** tab up top. That's where every part of this happens. There is no separate credit screen to hunt for.

DO THIS

Add a goodwill credit, step by step

1

Open Receivables and attach your customer

From the left menu, click **POS**, then **Receivables**, and make sure you're on the **Payment** tab. In the left panel, use **Search accounts** to find your loyal customer and attach them.

2 Type the amount in Payment amount

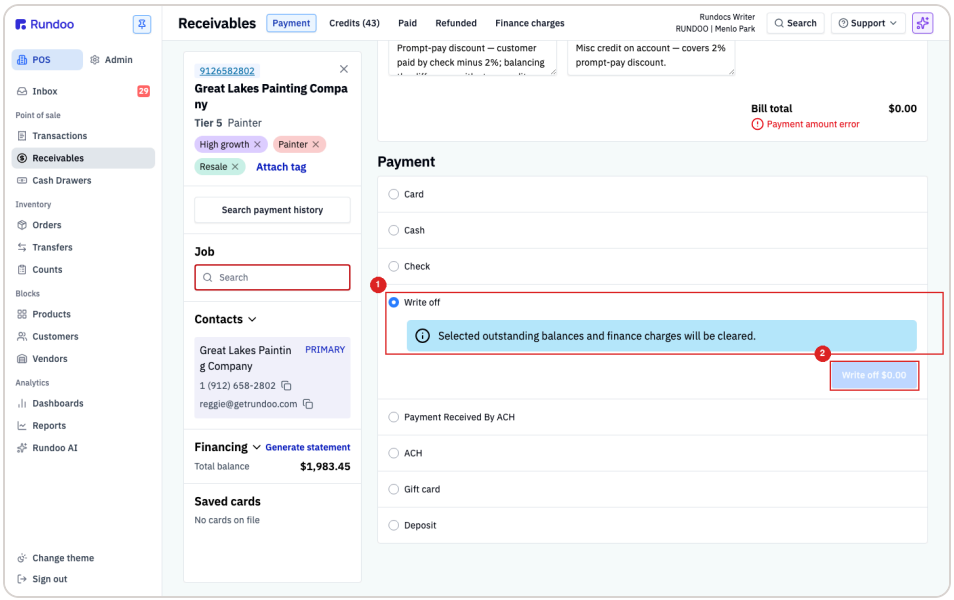
This is the part that trips people up, so do it first. Type the credit amount, say **50.00**, into the **Payment amount** field. Leave every open invoice unchecked. That amount is what the write-off will tender in a moment. If you leave this field blank, the button at the bottom stays at **Write off $0.00** and nothing will commit.

3 Check "Credit to add" for the same amount

Scroll to the bottom and check the box for **Credit to add**, entering the same number, **50.00**. Matching the two fields is what turns this into a single fifty-dollar credit rather than two. Then fill **Credit notes**, which Rundoo requires. Something specific like "Loyalty credit, thank you for your business" beats "credit" when you look back a year from now.

4 Tender it as "Write off"

Down in the **Payment** section, select **Write off** as the payment type. You'll see a blue banner that says outstanding balances and finance charges will be cleared. Since you didn't check any invoices, that's harmless here. Nothing real gets written off. The write-off tender is simply what lets Rundoo record the credit with no money coming in.



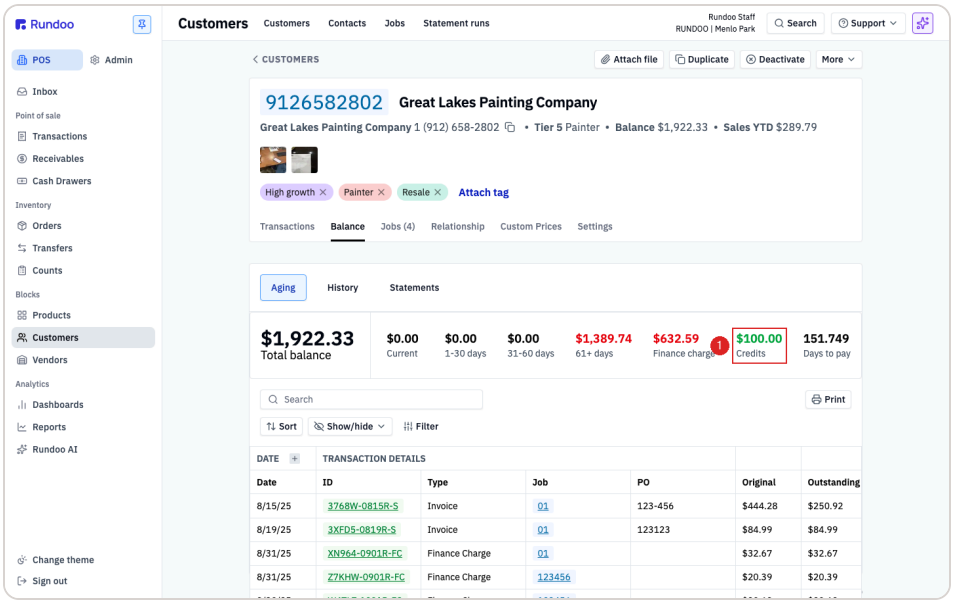
Pick **Write off** as the tender. Notice the button reads **Write off $0.00** here: that's the reminder that the **Payment amount** field up top still needs your credit amount before it will commit.

5 Add the second note and commit

Rundoo asks for a second note in **Bill payment notes**, and yes, it's also required. It's a separate audit trail from the credit note, so write something real here too, like "Goodwill credit." Then click **Write off $50.00** in the bottom-right to commit.

6 Confirm it landed on the account

Open the customer from **Customers**, click the **Balance** tab, and look at the aging row. The **Credits** bucket on the far right now shows the stored value you just added, ready to apply automatically against their next bill.



The credit shows up in the **Credits** bucket on the customer's **Balance** tab. Anything above $0.00 is money waiting to be spent.

KEEP IT HANDY

At a glance

WHERE

POS → Receivables → Payment

No separate "issue credit" screen.

THE TENDER

Write off

No invoices checked, so no real debt is written off.

TWO REQUIRED NOTES

Credit notes + Bill payment notes

Separate audit trails. Write something specific in both.

TO REVERSE IT

Void the bill payment

Find it via the credit's "Created by Bill Payment" link.

Good to know

- Put the same number in **Payment amount** and **Credit to add**. If the two don't match, you'll either commit nothing or create the wrong credit.
- Credits never expire in Rundoo. They sit on the account until they're applied to an invoice or voided, and they apply automatically to the next outstanding bill.
- A customer credit is money you owe them, which is not the same as their charge-account balance (what they owe you). The shared word "credit" trips people up.
- Practice store first. Nothing in there is live, so add a goodwill credit or two and watch how it lands on the account before you do it for real.