Rundoo

GLANCE CARD

GETTING STARTED WITH RUNDOO · TRANSACTIONS

Credit Where It's Due

Thank a loyal customer with a standalone goodwill credit. Built in Receivables, tendered as a write-off, no money changes hands.

THREE FIELDS TO GET RIGHT

1

Payment amount

Type the credit here first. Blank means the button stays at $0.00.

e.g. 50.00

2

Credit to add

Check the box, same number, so it's one credit not two.

e.g. 50.00

3

Write off

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

Payment type

Do it in 5 taps

1. Open **POS** → **Receivables**, stay on the **Payment** tab, and attach your customer.
2. Type the amount in **Payment amount**; leave invoices unchecked.
3. Check **Credit to add** (same amount) and fill **Credit notes**.
4. Select **Write off**, then fill **Bill payment notes**.
5. Click **Write off $50.00**. Done.

Where it lands

Balance → Credits

The credit sits in the Credits bucket and applies automatically to the next bill. Credits never expire.

Both notes are required. Credit notes and Bill payment notes are separate audit trails, so write the real reason in each. To undo the credit later, void the originating bill payment.