Rundoo

GETTING STARTED WITH RUNDOO · TRANSACTIONS

Credit Where It's Due

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

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

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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

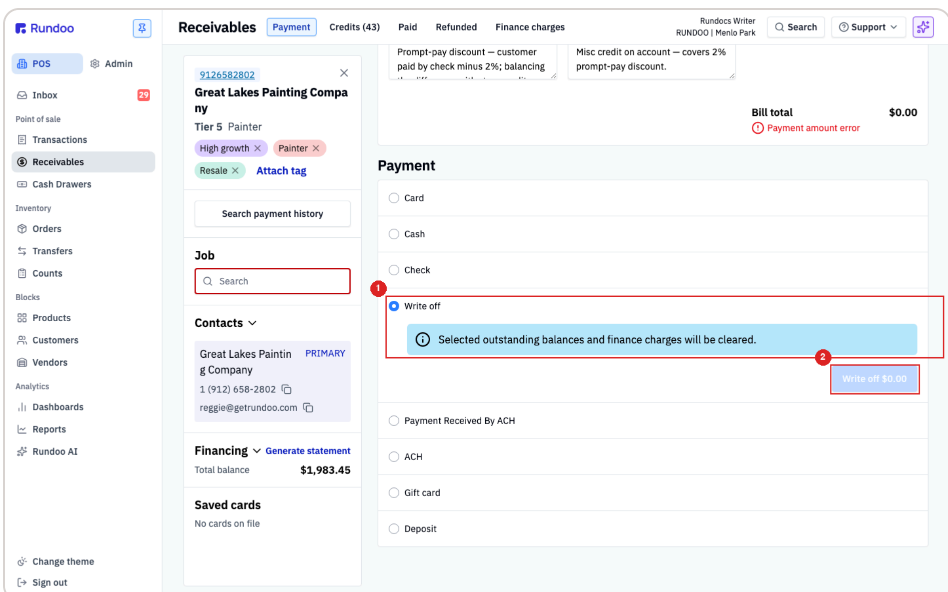
Check "Credit to add" for the same amount

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.



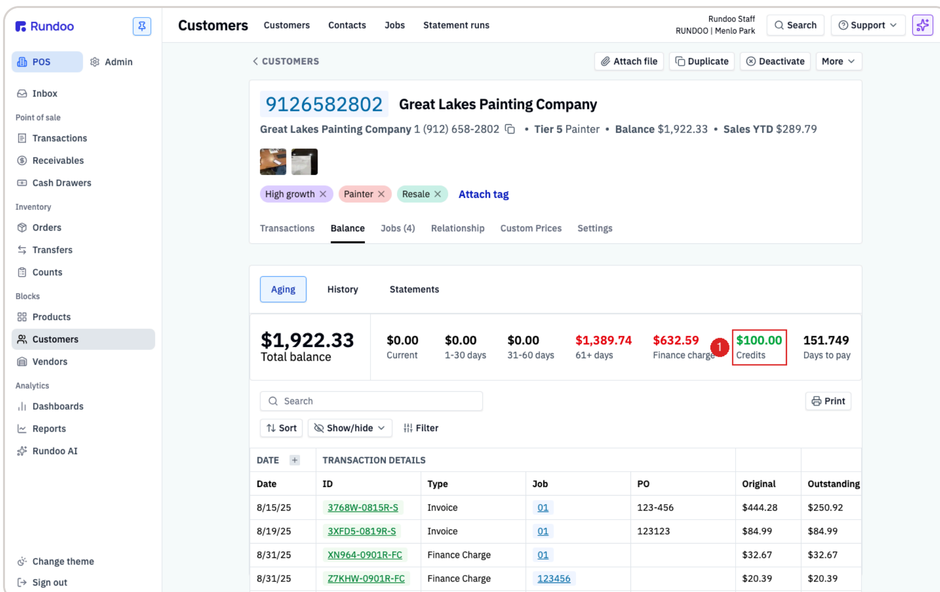
Pick **Write off** as the tender. Notice the button reads **Write off $0.00** here: that's the reminder that the **Payment amount** field up top still needs your credit amount before it will commit.

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.