Rundoo

GETTING STARTED · DELIVERIES

Deliveries, Start to Finish

> Schedule it from the sale, build the run, let your driver work it from a phone, and keep the proof on file.

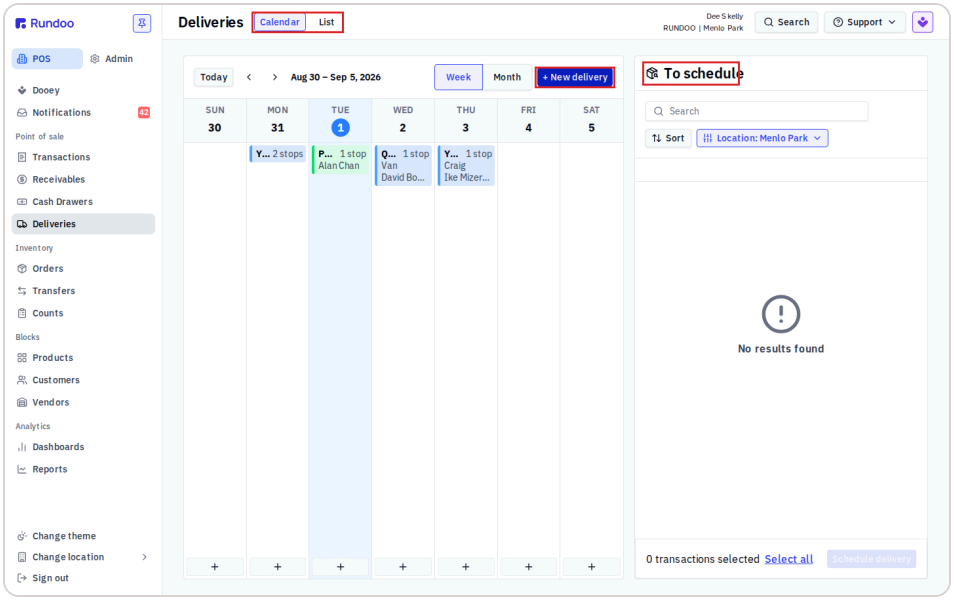
Step-by-step walkthrough 7 min read Companion to the video

A contractor loads up on lumber and says, "get it to the site by Thursday." You can schedule that whole delivery right from the sale, build the run, and track it to the doorstep. What is new is everything that happens after the counter: you decide exactly who touches a delivery, your driver runs the route from a phone, and every drop comes back with proof. Here is one delivery, start to finish.

WHERE IT LIVES

The Deliveries tab

In **POS** mode you have a **Deliveries** tab in the left sidebar. It opens on a **Calendar** of every run, with a **List** view next to it. On the right is the **To schedule** panel: your to-do list of every order staged for delivery that is not on a run yet. A delivery is one truck run for a departure date, and it holds one or more **stops**, one stop per address.



The Deliveries tab: the calendar of runs, with the To schedule queue waiting on the right.

DO THIS

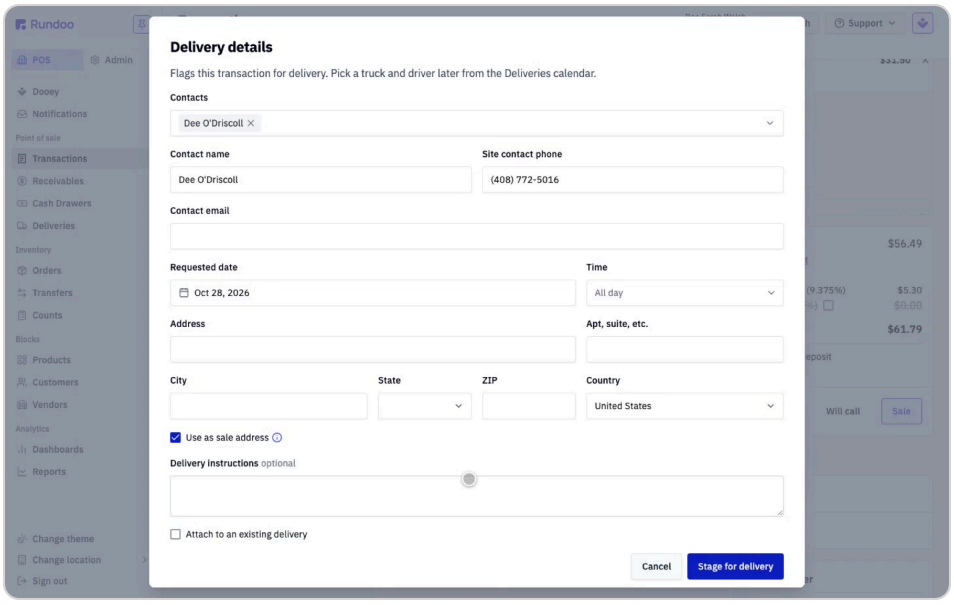
One delivery, step by step

1 Decide who does what

A good delivery starts with who is allowed to do what. Go to **Admin** → **Staff** → **Permissions**, and look in the **Point of Sale** section for three switches. **Schedule deliveries from a sale** puts the button in front of your counter staff. **View and update stops on deliveries assigned to you** is for drivers, so a driver only sees their own runs. **View and manage all deliveries** is for your dispatcher, the person who runs the whole board. Turn on only what each person needs. Everyone keeps what they already had.

2 Schedule it from the sale

Ring the order up the way you always do, then click **Schedule delivery** at the bottom of the cart. In the **Delivery details** box, set the **Requested date** (the date they need it on site, not the day the truck rolls), confirm the job-site address, and add any **Delivery instructions** for the driver. Attach the customer as a contact so the delivery carries their name and number. Then click **Stage for delivery** and take payment as normal. That is the whole job at the counter.

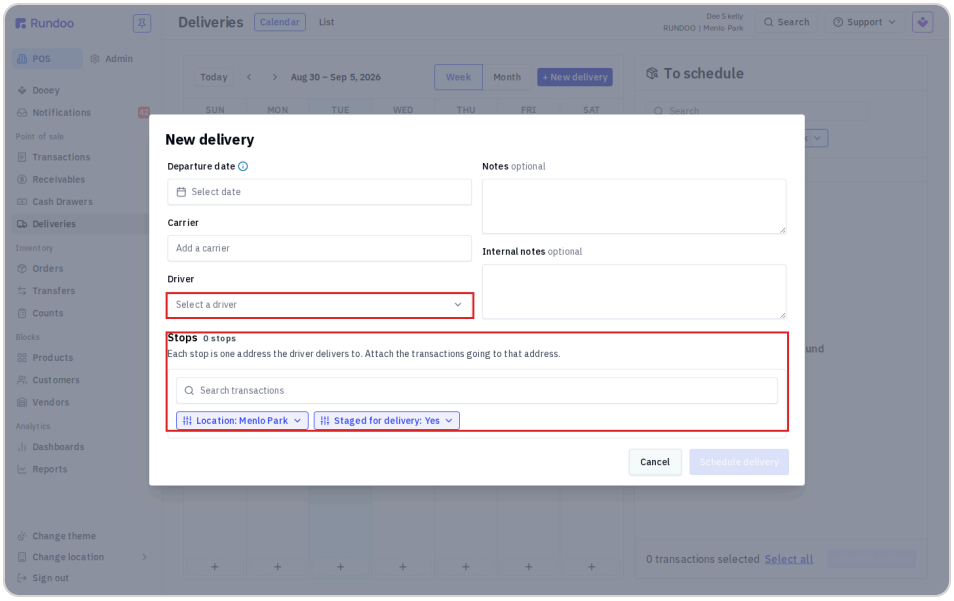


The Delivery details box. Set the date and address, then Stage for delivery.

3

Put it on a run

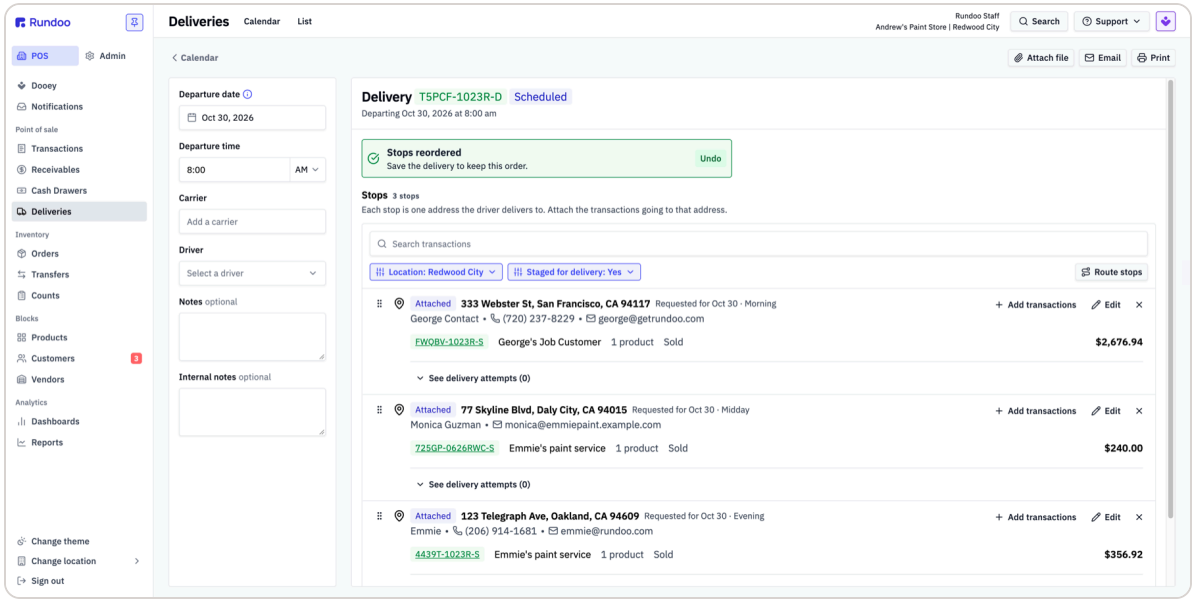
Whoever runs your trucks opens the **Deliveries** tab. Every staged order is sitting in the **To schedule** panel. Tick the ones going out together and click **Schedule delivery**, or click **+ New delivery** to build a run from scratch. Set the **Departure date**, pick a **Carrier** if you use one, and choose the **Driver**. Each address becomes its own **stop**, and the run lands on the calendar for that day.



Building the run: a departure date, a driver, and a stop for each address.

4 Line up the route

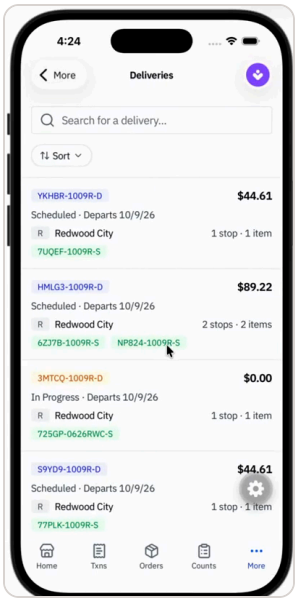
Open the run and click **Route stops**. Rundoo puts the stops in a sensible driving order so your driver is not doubling back across town. A green **Stops reordered** banner appears; click **Save** to keep the new order. If you would rather set the order yourself, drag the stops by the handle on the left.



Route stops lines the addresses up in driving order. Save to lock it in.

5 Run the route from the truck

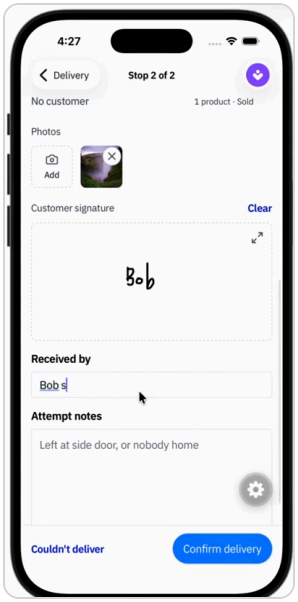
Here is the part that is brand new. Your driver signs in to the **Rundoo mobile staff app** on their phone and sees the deliveries assigned to them, stops already in order. One tap opens turn-by-turn directions to the next address, so there is no copying addresses into a maps app. The whole run works from the phone, no paper route sheet.



The driver's view: their runs for the day, each with its stops, ready to work.

6 Capture proof at the door

At each stop the driver snaps a **photo** of the drop, has the customer sign right on the screen under **Customer signature**, notes who it was **Received by**, and taps **Confirm delivery**. The moment a status changes, the store and the customer are notified automatically, so there are no "did it get there" phone calls.



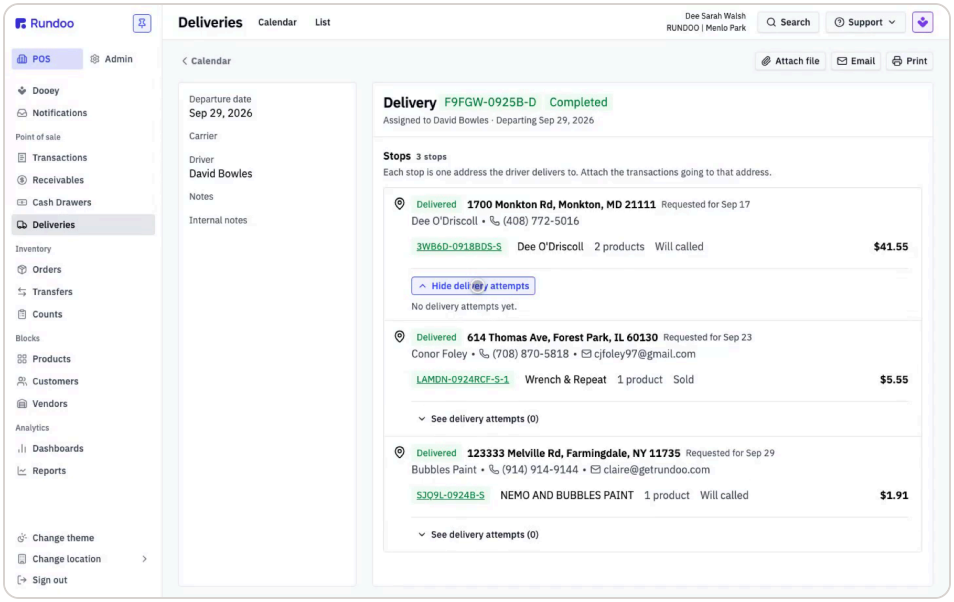
Proof at the stop: a photo, a signature, who received it, then Confirm delivery.

7 When it does not go to plan

Nobody home? The driver taps **Couldn't deliver**, snaps a photo, and leaves a quick note. That attempt is logged with a time stamp under the stop, so the next morning you know exactly which addresses to run again, and you have the proof if anyone ever asks.

8 Track it to Completed

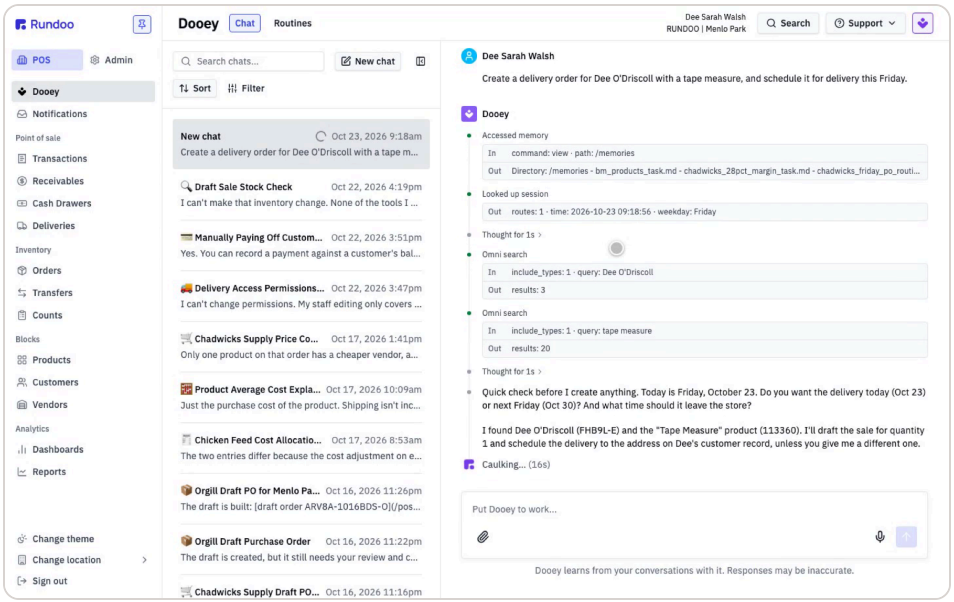
As the run goes out, its status moves forward only: **Scheduled** → **In Progress** → **Completed** (or **Cancelled** if it is called off). Back in the store, open the run and it reads **Completed**, with every stop marked **Delivered**. The photo and signature sit right there under the stop's delivery attempts. If a customer ever calls about an order they "never got," you are two clicks from showing them the picture on their porch and their own signature.



Back in the store: the run reads Completed, every stop Delivered, proof on file.

9 Or just ask Dooey

You do not have to click through any of this if you would rather ask. **Dooey** can create a delivery, edit one, or pull a report. Ask it how many deliveries went out last week and it will tell you; ask it to set up a delivery for a customer this Friday and it will draft it for your review.

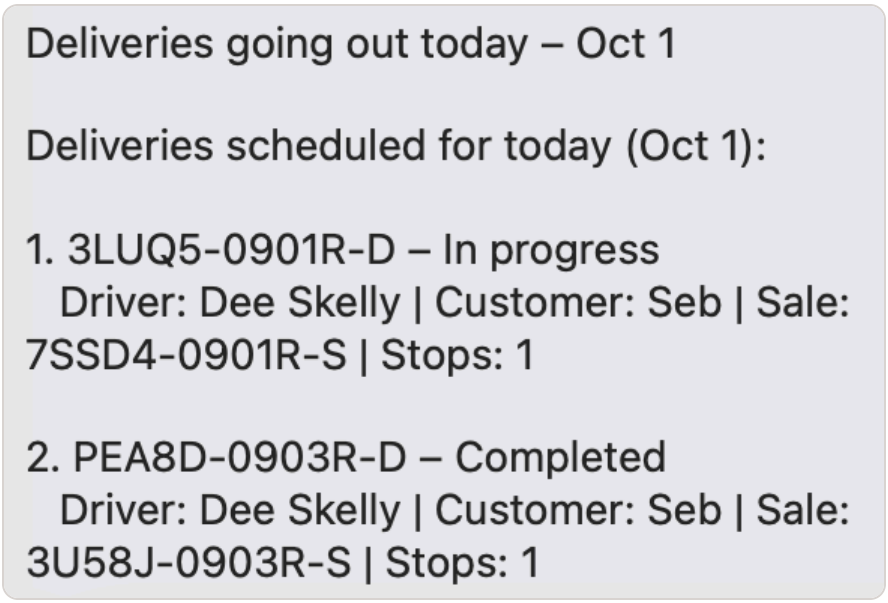


Dooey drafting a delivery from a plain-English request.

GO FURTHER

A daily reminder of what needs to go out

Rundoo does not ship a built-in "deliveries due today" alert, but you can build one in a couple of minutes with a **Dooey routine**. On a staff account that can run reports, ask Dooey to set up a daily **Routine** that texts or emails whoever runs deliveries a rundown of the day: what is scheduled to go out, plus anything sold for delivery that is not on a run yet and is coming due. You pick text, email, or both, and you word it however you like.



The routine as a daily text: each run with its status, driver, sale, and stop count.

KEEP IT HANDY

At a glance

REQUESTED DATE

When they need it

Set on the sale. Not the truck day, the arrive-by date.

TO SCHEDULE PANEL

The to-do list

Every order staged for delivery that is not yet on a run.

STATUSES

Scheduled → In Progress → Completed

Forward only. Completed locks the run.

DRIVERS

Rundoo staff users

Add anyone who drives under Admin → Staff so they can log in to the app.

Good to know

- Carrier and Driver are optional at scheduling time, so you can lock in the day now and assign the driver the morning it goes out.
- A sale has to be staged for delivery to appear in the To schedule queue, so if an order is missing, check it was marked for delivery on the cart rather than pickup or carry-out.
- Several orders can ride on one run. Multi-select in the To schedule panel, and add more to a run later with Search transactions on the delivery.
- Drivers log in with their own Rundoo staff account and see only the deliveries assigned to them, which is why each driver needs their own staff user.
- Managing several stores from one desk? Use the List view with the Location filter widened, rather than the Calendar, which shows one location at a time.