Rundoo

GETTING STARTED WITH RUNDOO · PURCHASE ORDERS

Drafting a Purchase Order

> Pick a vendor, let Rundoo suggest quantities, and save it for later.

Step-by-step walkthrough ~3 min read Companion to the Draft Your Order video

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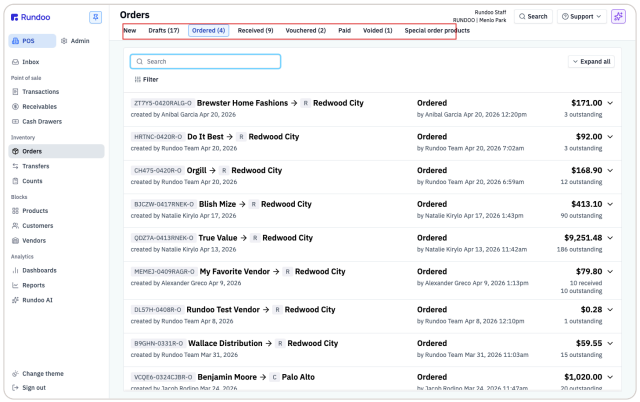
You've spent years learning your shelves: what moves, what sits, and what always seems to run dry on a Friday afternoon. A purchase order is just how you tell a vendor to send more. Rundoo handles the paperwork behind it, so you can spend less time with a clipboard and more time behind the counter. This guide walks you through building one PO from a blank screen to a saved draft, ready to send whenever you are.

WHERE IT ALL LIVES

The Orders tab

In **POS** mode, click **Orders** in the left sidebar. Every purchase order you've ever started lives here. Along the top is a strip of tabs that follows a PO through its whole life, left to right: **New**, **Drafts**, **Ordered**, **Received**, **Vouchered**, **Paid**, and **Voided**. Each tab carries a live count of how many POs are sitting in that stage. We're starting all the way at the left, in **New**, to build one from scratch.



The tabs across the top of Orders are the life of a PO, from New on the left to Paid and Voided on the right.

DO THIS

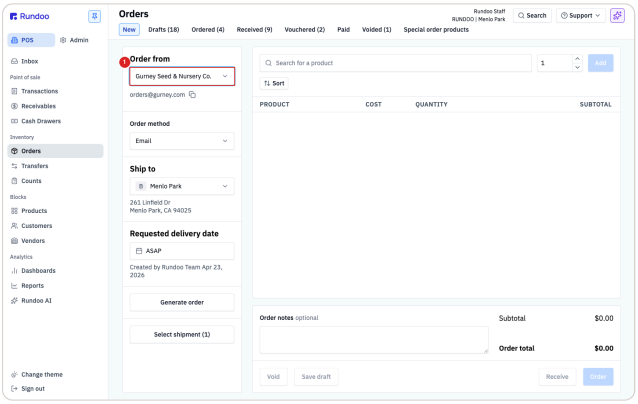
Build a draft, step by step

1 Open a new order

Clicking **Orders** lands you on the **New** tab by default. This is the order builder: **Order from** on the left, a product search across the middle, running totals on the right, and a row of action buttons along the bottom. Most of it looks greyed out right now, and that's on purpose. One choice wakes it up.

2 Pick your vendor

First things first: tell Rundoo who you're ordering from. Click **Order from**, start typing a vendor name, and choose from your list. The moment you pick one, the rest of the form unlocks. The side panel fills in with the **Order method** (how the PO will reach the vendor later), **Ship to** (defaults to your current location), and a **Requested delivery date** (defaults to ASAP). Don't see the vendor you want? They probably haven't been added yet, and you can create them on the **Vendors** page.

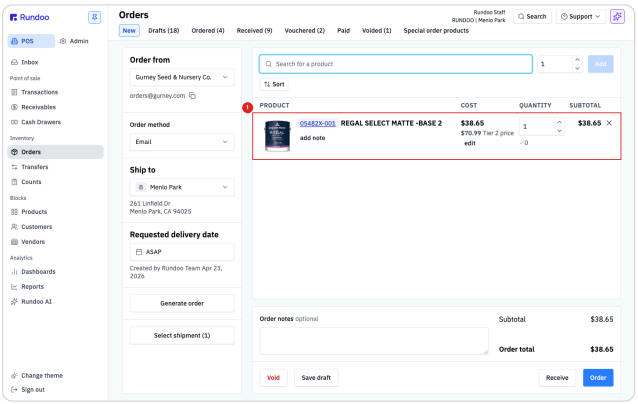


Pick a vendor under Order from and the whole builder comes to life: side-panel fields, product search, and the action buttons at the bottom.

3 Add what you need by hand

Click into **Search for a product** and start typing. Rundoo matches on name, SKU, or vendor SKU. Set a count with the stepper and click **Add**, or drop the line on first and type the number into its **QUANTITY** cell. Got a scanner at the counter? Scanning a barcode drops the matching product straight onto the cart.

Each line shows **COST**, **QUANTITY**, and a running **SUBTOTAL**. Cost defaults to the product's vendor cost. Click **edit** under it to override for this order (say a contract price or a one-off deal), and click **add note** on a line to leave the vendor a note like "substitute OK."



Every line carries its cost, quantity, and subtotal. Use edit to change the cost for this PO, and add note to leave the vendor a line-level note.

4 Let Rundoo suggest the quantities

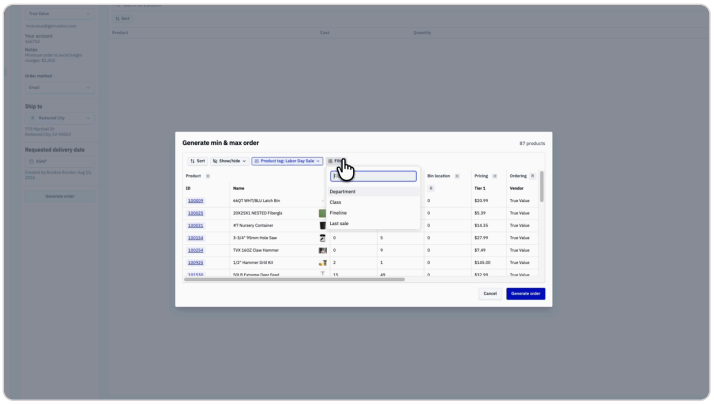
Here's where Rundoo saves you the guesswork. Instead of building the whole list from memory, click **Generate order** in the side panel. Rundoo looks at what you've been selling and what's on your shelves and works out a full restock for you.

Two methods sit behind that button, and you pick one per vendor. **Predictive** forecasts from last year's sales for this same stretch of the calendar, so the season is baked in. It's the natural fit where velocity matters. **Min/Max** is simpler: when a product drops below the minimum you set, Rundoo tops it back up to the maximum.

5 Review and filter before it becomes an order

Rundoo doesn't drop the whole restock straight into your cart. First it shows you the suggested products so you can look them over, and for a busy store that list can run long. Filters sit across the top so you can narrow it to just the part of the store you're buying for. Restocking for an upcoming sale, or topping up one aisle? Click **Filter** and pick a **Product tag** (say a Labor Day sale), or get as specific as **Department**, **Class**, **Fineline**, or **Last sale**. Your list shrinks to just those items.

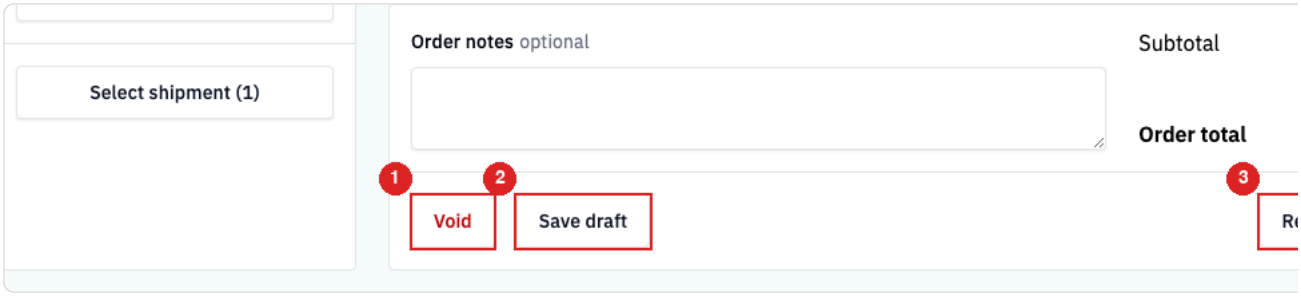
You still hold the reins. Change any quantity, or if an item was tagged by accident, take it right off the order. When it looks right, click **Generate order** and those lines drop into your cart. Filtering keeps the order accurate and saves you from overstocking off a giant list you'd otherwise have to sift through.



Generate order lets you review first. Filter by product tag, department, class, fineline, or last sale to narrow a big suggested order down to just what you need.

6 Save it as a draft

When the order looks right but you're not ready to send it, click **Save draft** at the bottom right. The PO leaves the builder and lands on the **Drafts** tab, safe to pick back up whenever you like. That's the whole job for this video. In the next one, *From Draft to Ordered*, we pick this draft up and send it off to the vendor.



The action cluster at the bottom right. Save draft stashes the PO on the Drafts tab. Order sends it (that's the next video).

KEEP IT HANDY

Drafting a PO at a glance

WHERE **POS → Orders → New** Orders lands here by default.	THE ONE REQUIRED FIELD **Pick a vendor** The builder stays locked until you do.
SUGGESTED QUANTITIES **Generate order** Review first, then filter by tag, department, class, fineline, or last sale.	SAVE FOR LATER **Save draft** Find it again on the Drafts tab.

Good to know

- Click **Save draft** or **Order** and nothing happens? You're almost certainly missing a vendor or a product line. Rundoo won't save an empty PO, and it won't nag you about it either, so give those two a quick check.
- Any cost you edit or note you add on a line rides along on the PO the vendor receives, so a "substitute OK" note lands right where they'll see it.
- Generate order leans on your sales history, so a brand-new product with no track record may get skipped. Add those lines by hand and you're set.
- Buying for just part of the store? After Generate order, filter the suggested list by product tag, department, class, fineline, or last sale, so you order for one aisle or an upcoming sale instead of the whole store.
- This is your practice store. Build and save all the drafts you like. Nothing leaves the building until you send it.