

Drafts, Quotes & Will Call

| How to save a sale to finish later.

Step-by-step walkthrough ~4 min read Companion to the [4:16 video](#)

Not every sale finishes at the counter right now. A contractor wants a price for a whole job. A regular asks you to set a few gallons aside for pickup this afternoon. Or you're halfway through ringing someone up and have to step away. Rundoo has a spot for each of those, so nobody has to start over. The one thing worth burning into memory: only a Will call actually holds your stock. A Draft and a Quote leave your shelves free.

BEFORE THE STEPS

The three buttons, and the three tabs

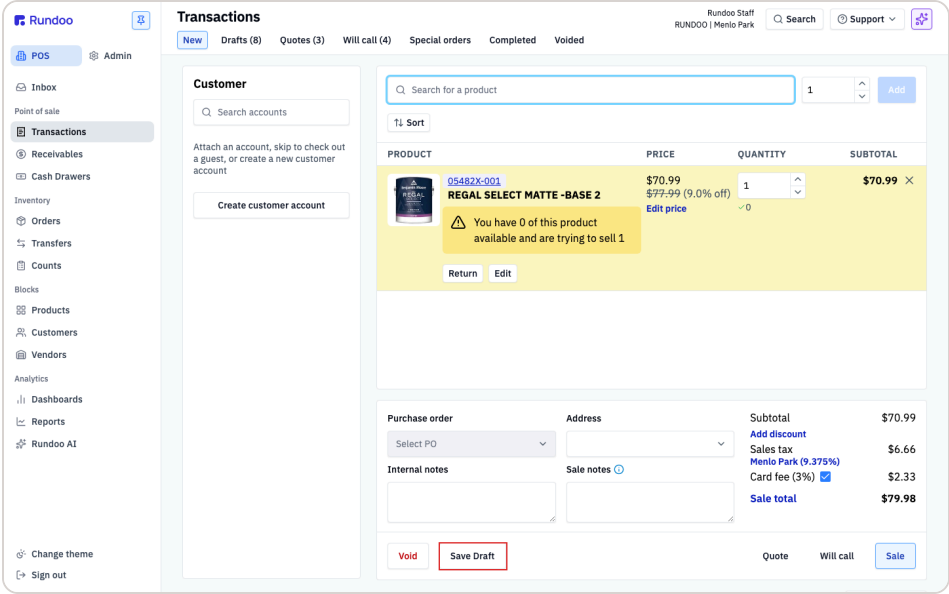
Everything here lives in **POS** → **Transactions**. Down in the action cluster at the bottom of the cart, next to **Sale**, you'll see a button for each way to hold a sale: **Save Draft**, **Quote**, and **Will call** (with **Void** on the far left). Each one parks the sale under its own tab in the top-tab strip, **Drafts**, **Quotes**, and **Will call**, and each tab carries a live count so you can see at a glance what's waiting.

DO THIS

The three ways to save a sale

1 Save a Draft to pause the cart

A draft is the internal pause button. No customer needed, no inventory touched, nothing leaves the store. Build the cart as usual, then click **Save Draft** in the action cluster. The cart clears and the ticket lands under the **Drafts** tab, ready to reopen when your customer comes back with the rest of their list.



Click Save Draft to park the cart. No customer is attached, and nothing moves in inventory.

2

Build a Quote to share a price

A quote is a priced offer you can hand a customer, on paper or by email, without reserving a thing. Build the cart, then **attach a customer** from the left panel (a quote has nowhere to go without one). Click **Quote**. A panel opens with an **Expiration** date and three choices: **Save** to keep it internal, **Save & Print** for a paper copy, or **Save & Email** to send it straight over.

The screenshot shows the Rundoo POS interface. On the left is a sidebar with navigation options: POS, Admin, Transactions, Receivables, Cash Drawers, Inventory, Orders, Transfers, Counts, Blocks, Products, Customers, Vendors, Analytics, Dashboards, Reports, and Rundoo AI. The main area is titled 'Transactions' and shows a list of transactions. A transaction for 'Hershey Builders' is selected, showing details like 'Tier 2 Retail', 'top 10', and 'Rep-Joe'. Below this, there's a section for 'Job' and 'Contacts'. The 'Quote' section is highlighted, showing an expiration date of May 24, 2026, and three buttons: 'Save', 'Save & Print', and 'Save & Email'. The 'Save & Email' button is highlighted with a red box and a red circle with the number 1.

Set an expiration date, then Save, Print, or Email. The items stay on your shelf, free for anyone else. Attach the customer first. If you click **Quote** with no customer, Rundoo shows a red banner, "A customer account is required to send a quote," and greys out all three save buttons.

Set up a Will call to hold the stock

A will-call is the committed hold. This is the one that reserves inventory, so the quantity comes off what's available to sell and waits for your customer. Build the cart, **attach a customer** (required, since the hold ties to their account), and click **Will call**. A panel confirms, "The order will be prepared, but the customer must pay during pickup." Choose **Save**, or **Save & Print** to hand them a pickup slip.

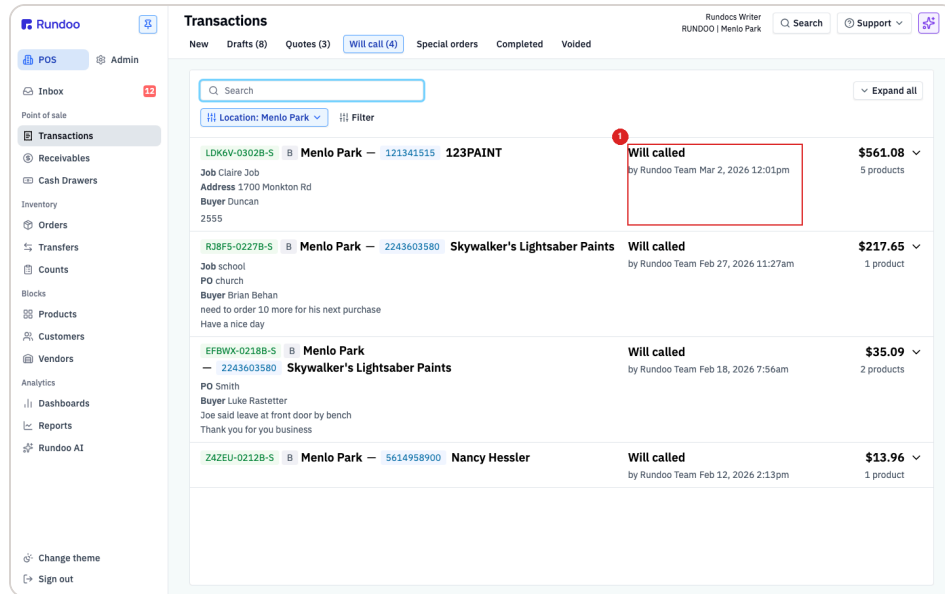
The screenshot shows the Rundoo POS interface. On the left is a sidebar with navigation options: POS, Admin, Inbox, Point of sale, Transactions (selected), Receivables, Cash Drawers, Inventory, Orders, Transfers, Counts, Blocks, Products, Customers, Vendors, Analytics, Dashboards, Reports, and Rundoo AI. The main area is titled 'Transactions' and has tabs for New, Drafts (8), Quotes (3), Will call (4), Special orders, Completed, and Voided. A yellow warning banner at the top states: 'You have 0 of this product available and are trying to sell 1'. Below this, a transaction for 'Hershey Builders' (Tier 2 Retail) is shown with a 'top 10' tag and a 'Rep-Joe' tag. A yellow note says 'Ask about his big dog named Wybie'. The 'Purchase order' section shows a 'Select PO' dropdown, 'Internal notes', and 'Sale notes'. The 'Address' field is empty. The 'Subtotal' is \$70.99, 'Add discount' is \$6.66, 'Sales tax' is \$2.33, and 'Card fee (3%)' is \$2.33, resulting in a 'Sale total' of \$79.98. The 'Will call' section shows a confirmation message: 'The order will be prepared, but the customer must pay during pickup'. At the bottom right, there are buttons for 'Save' and 'Save & Print', with a 'Show prices' checkbox.

Save the will-call and the stock is committed to that customer. The Show prices box controls whether the printout lists line prices.

4

Reopen a held sale to finish it

When your customer is back, click the tab where the sale is parked, then click its row. The cart reloads with the full action cluster available again. Click **Sale** to take payment (pick a tender like **Charge account**, then **Charge**) and the pickup is done. It works the same for a draft, a quote, or a will-call.



The screenshot shows the Rundoo Transactions interface. The left sidebar contains navigation links: POS, Admin, Inbox, Point of sale, Transactions (selected), Receivables, Cash Drawers, Inventory, Orders, Transfers, Counts, Blocks, Products, Customers, Vendors, Analytics, Dashboards, Reports, and Rundoo AI. The main area displays a list of transactions under the 'Will call (4)' tab. Each transaction row includes a transaction ID, location, buyer name, address, and a 'Will called' status with a timestamp. A red box highlights the 'Will called' status and a red circle indicates the 'Will called' button.

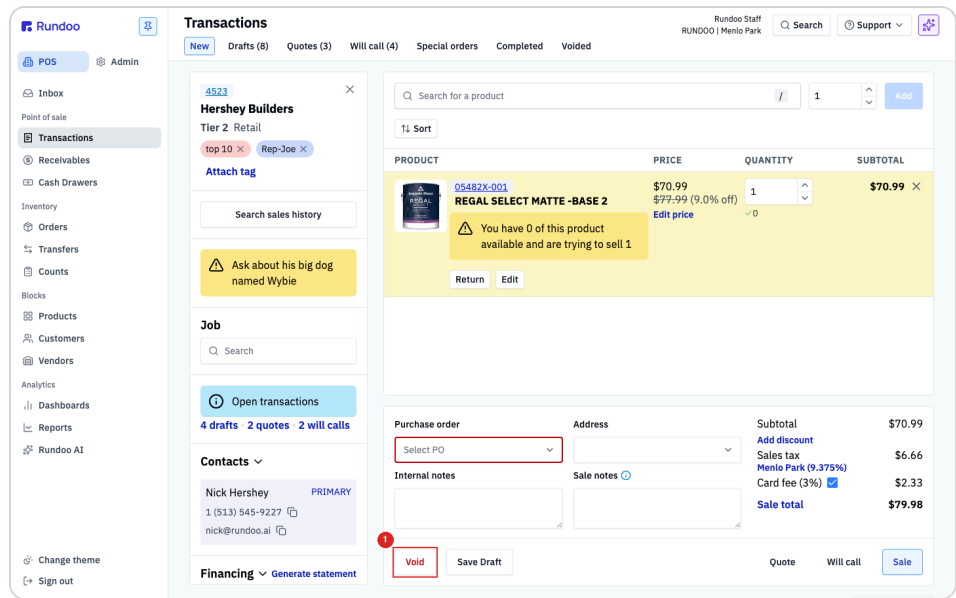
Transaction ID	Location	Buyer Name	Address	Status	Timestamp	Amount	Products
LDK6V-0302B-S	Menlo Park	Job Claire Job	Address 1700 Monkton Rd Buyer Duncan 2555	Will called	by Rundoo Team Mar 2, 2026 12:01pm	\$561.08	5 products
R38F5-0227B-S	Menlo Park	Job school	PO church Buyer Brian Behan need to order 10 more for his next purchase Have a nice day	Will called	by Rundoo Team Feb 27, 2026 11:27am	\$217.65	1 product
EFBWX-0218B-S	Menlo Park	PO Smith	Buyer Luke Rastetter Joe said leave at front door by bench Thank you for you business	Will called	by Rundoo Team Feb 18, 2026 7:56am	\$35.09	2 products
Z4ZEU-0212B-S	Menlo Park	Nancy Hessler		Will called	by Rundoo Team Feb 12, 2026 2:13pm	\$13.96	1 product

Each row on the Drafts, Quotes, and Will call tabs is stamped with who saved it and when. That stamp only shows on the list, so read it before you click in.

5

Void one to clear it out

Cancelled order, or an old draft cluttering the tab? Open it from its tab so the cart loads, then click **Void** instead of Sale. It moves to the **Voided** tab for your records. There's no separate delete in Rundoo, so Void is how you retire a held sale. Void a will-call and the reserved stock goes right back onto your available shelf.



Void lives on the far left of the action cluster. Use it to cancel, never to complete a pickup.

KEEP IT HANDY

The three, at a glance

DRAFT Save Draft No customer, no hold. Just pauses the cart.	QUOTE Quote Customer required. Locks a price, stock stays free.
WILL CALL Will call Customer required. Reserves the inventory.	FINISH OR CLEAR Open the row → Sale or Void Same path for all three, from their tab.

Good to know

- Quote and will-call prices are pinned the moment you save. If your catalog changes later, the customer keeps the price they were given. Sales tax still recalculates at pickup, so a rate change flows through.
- Need to swap the customer on a saved quote or will-call? Void it and rebuild with the new customer attached from the start. Swapping in place leaves the old pricing and tax behind.
- Promoting a held sale to a more-committed state (a Draft up to a Will call, say) is one-way. To unwind, void it and rebuild from the New tab.
- Will call is for stock you already have on hand. If the customer wants something you don't stock, that's a Special order, not a will-call.