Rundoo

GETTING STARTED WITH RUNDOO · INTEGRATIONS

# FanBuilder Loyalty

> Enroll a customer once, and Rundoo and FanBuilder keep points, coupons, and details in sync. No double entry.

Step-by-step walkthrough  ~4 min read  Companion to the FanBuilder Loyalty video

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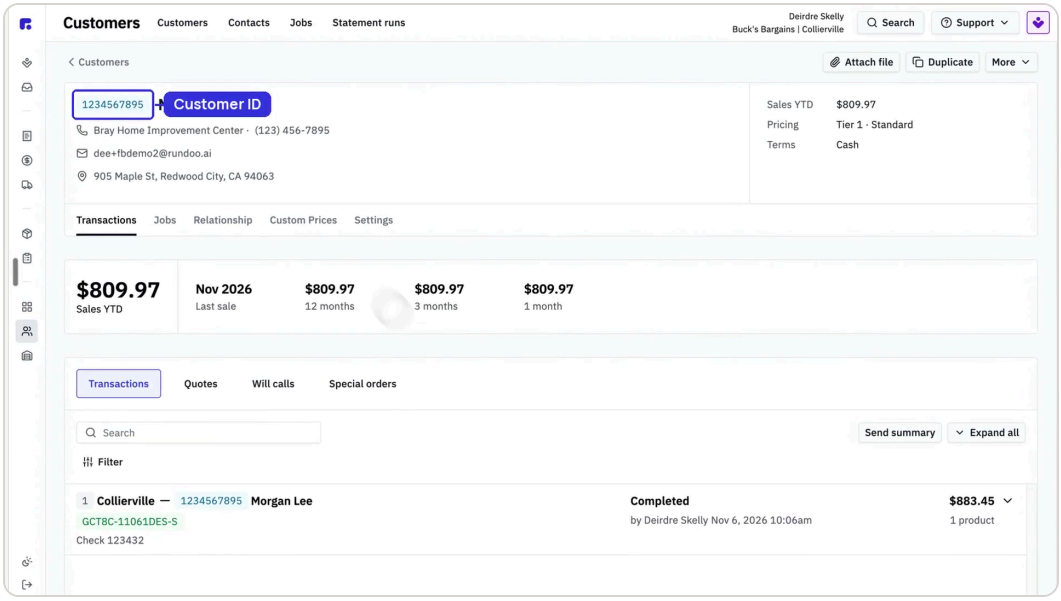
If you are an Orgill dealer running FanBuilder, Rundoo now connects to it directly. Points, rewards, and coupons move between your point of sale and FanBuilder on their own, so nothing gets tracked by hand and nothing gets typed twice.

BEFORE YOU START

## The customer ID is the link

FanBuilder is Orgill's loyalty program, and the integration is for Orgill dealers. Orgill turns it on for your store, so if you are not set up yet, contact your Orgill rep first. Once it is on, every customer you create in Rundoo gets a **Customer ID**, shown at the top of their record. That ID is what Rundoo and FanBuilder use to match a shopper to their rewards account, and it is what you type into Store Systems Manager to look them up. In Rundoo the ID is usually the customer's phone number, but not always.




The Customer ID at the top of the record. The same number is the customer's FanBuilder ID.

DO THIS

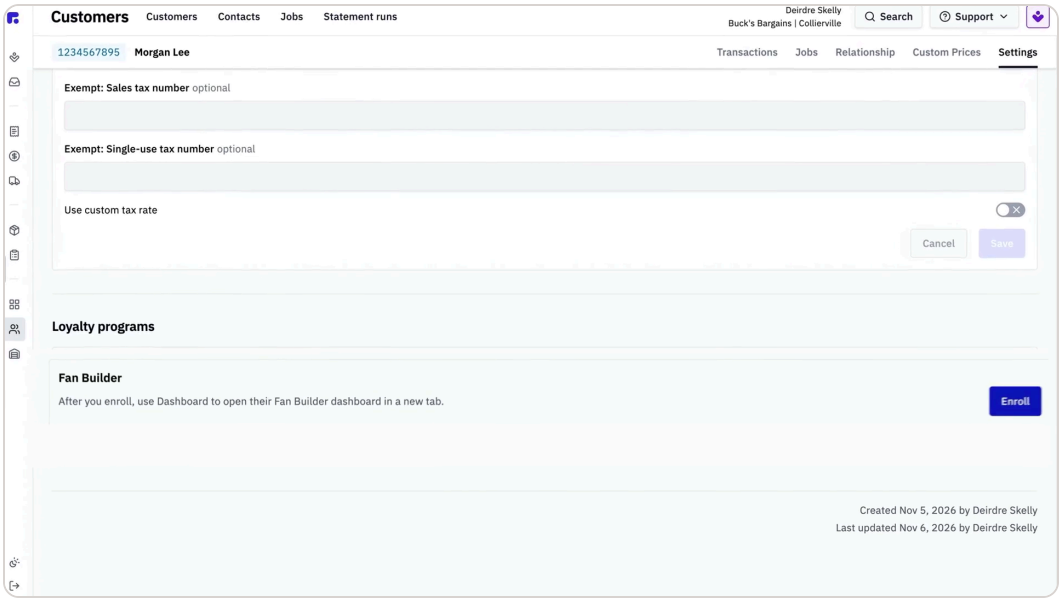
# FanBuilder, from first visit to first reward

## 1 Create the customer

Click **Customers**, then **Add customer**. Enter their name, phone number, and email, then click **Save**. The phone number matters most, since FanBuilder enrolls by phone. If the customer already exists in Rundoo, skip to the next step.

## 2 Enroll them in FanBuilder

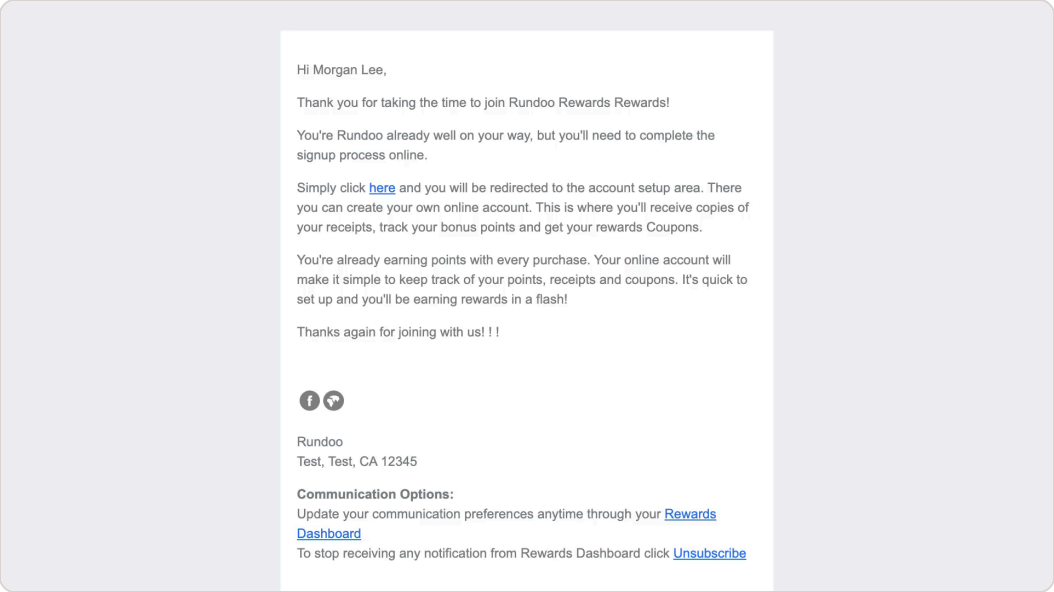
Open the customer's record and click the **Settings** tab. Scroll all the way down to **Loyalty programs**. In the **Fan Builder** card, click **Enroll**. That one click signs them up in FanBuilder and emails them an invite. Once enrolled, the card shows their FanBuilder ID and a **Dashboard** link.




Settings tab, Loyalty programs, Fan Builder, Enroll. You do this once per customer.

## 3 The customer finishes setup from their email

Nothing for you to do here, but worth knowing so you can explain it at the counter. The invite email has a link that takes them to the account setup page, where they pick a password. FanBuilder then sends a second email to activate the account, for security. They click **Activate**, wait a few seconds, and log in. Signing up also earns them their first coupon.



Hi Morgan Lee,

Thank you for taking the time to join Rundoo Rewards Rewards!

You're Rundoo already well on your way, but you'll need to complete the signup process online.

Simply click here and you will be redirected to the account setup area. There you can create your own online account. This is where you'll receive copies of your receipts, track your bonus points and get your rewards Coupons.

You're already earning points with every purchase. Your online account will make it simple to keep track of your points, receipts and coupons. It's quick to set up and you'll be earning rewards in a flash!

Thanks again for joining with us! ! !

Rundoo
Test, Test, CA 12345

**Communication Options:**
Update your communication preferences anytime through your Rewards Dashboard
To stop receiving any notification from Rewards Dashboard click Unsubscribe

The invite email. The "here" link opens account setup.

## 4 What the customer sees

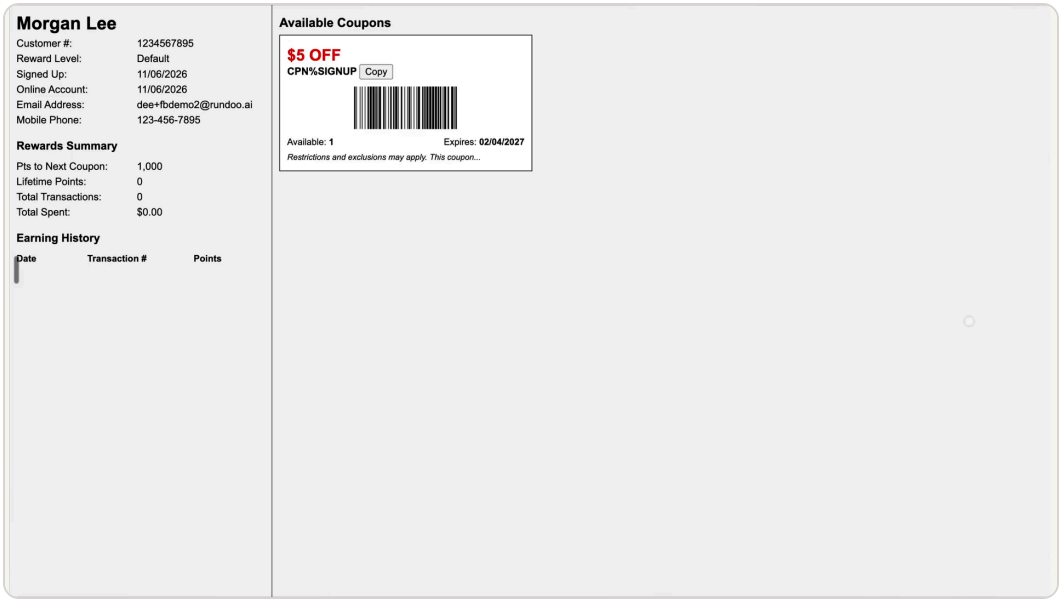
Once logged in, the customer has their own rewards dashboard: how many rewards they have, the coupons they can use, the points they have earned, and their receipts, with the points earned and coupons redeemed on each purchase. A brand new customer sees zero points and an empty receipt list until their first sale.

## 5 Keep one record up to date

Rundoo and FanBuilder stay in sync. Change the customer's address, email, or name in Rundoo, click **Save**, and the FanBuilder profile updates to match (a page refresh on their side may be needed). Rundoo is the source of truth for both, so there is no second record to maintain.

## 6 Ring up the sale and open their coupons

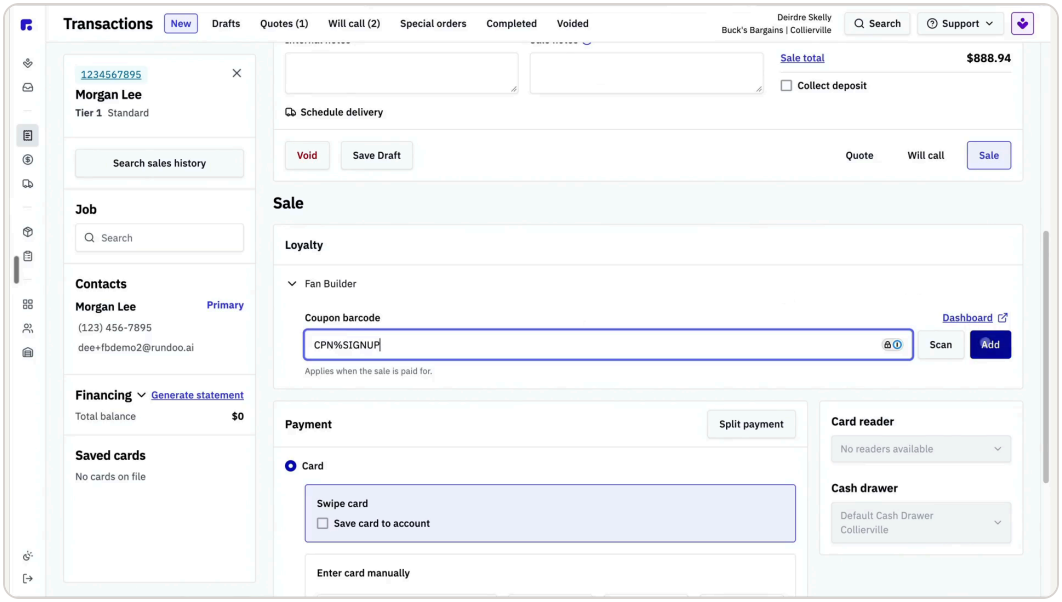
Click **Transactions** and start a new sale. Add the customer, then ring up their products as usual. In the cart, find the **Loyalty** section and expand **Fan Builder**. Click **Dashboard** to open the customer's FanBuilder dashboard in a new tab. Under **Available Coupons**, click **Copy** next to the coupon they want to use.




The Dashboard link opens the customer's coupons. Copy grabs the code.

## 7 Apply the coupon as a discount

Back in Rundoo, paste the code into the **Coupon barcode** field in the Fan Builder section and click **Add**. If the customer brought a printed coupon, click **Scan** and scan it instead. The coupon shows up as a **Discount** line at the top of the sale totals. Click **Sale** and take payment as normal. The coupon is used up when the sale completes, and the discount prints on the receipt.




Loyalty, Fan Builder, paste the code, Add. The discount applies when the sale is paid.

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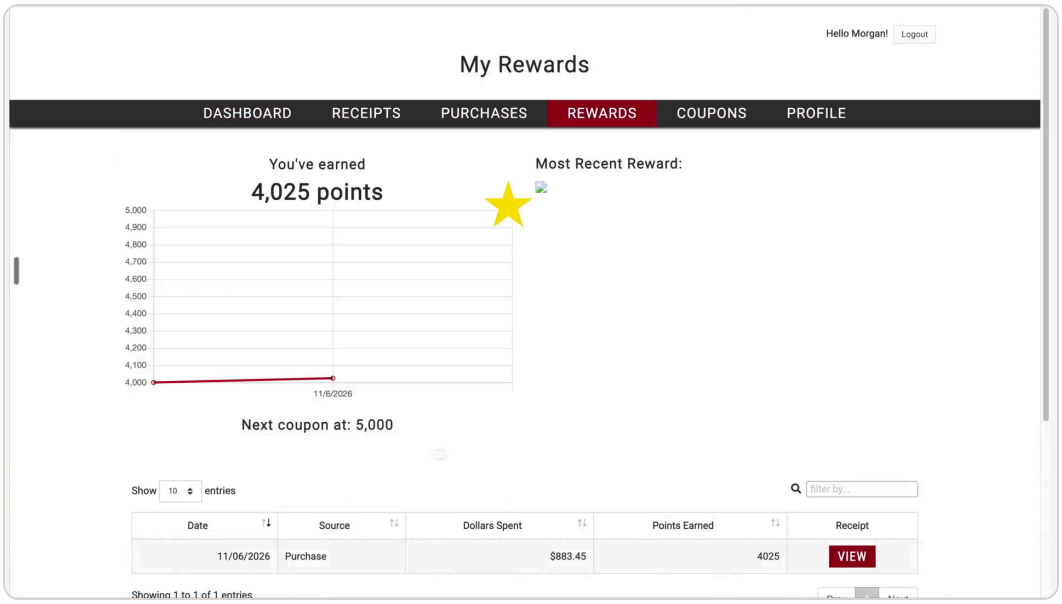
## After the sale, the loop closes on its own

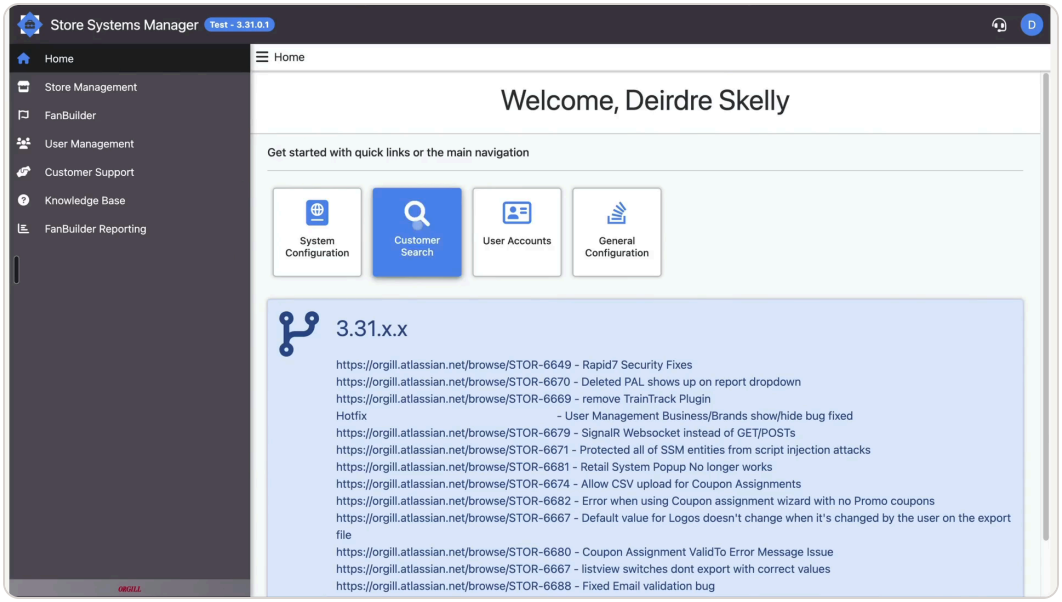
Every qualifying purchase earns points automatically. The customer's dashboard now shows the points from that sale, any new coupons they have unlocked, and the receipt with what they bought, the points they earned, and the coupons they used. Nothing to enter on your end.




The customer's view after one sale: points earned and the receipt behind them.

## 9 Look a customer up in Store Systems Manager

Store Systems Manager is Orgill's dealer dashboard for FanBuilder, and Orgill sets you up with it. From its home page, click **Customer Search**, type the Rundoo **Customer ID**, and click **Search**. The customer pops up. Click **Actions**, then **Manage Customer**, to see their profile, transactions, and rewards. There is a lot more you can do in Store Systems Manager, and since it is an Orgill product, your Orgill rep is the one to ask.




Store Systems Manager: Customer Search takes the same ID you see in Rundoo.

KEEP IT HANDY

## FanBuilder at a glance

ENROLL

### Customer → Settings → Loyalty programs

Click Enroll in the Fan Builder card. Once per customer.

REDEEM

### Sale → Loyalty → Fan Builder

Dashboard to copy a code, or Scan a printed coupon, then Add.

THE LINK

### Rundoo Customer ID = FanBuilder ID

Usually the phone number. Works in Store Systems Manager too.

GET SET UP

### Contact your Orgill rep

Available now for Orgill dealers. Orgill turns it on and provides Store Systems Manager.

**Good to know**

- **Two locations, one account.** The customer ID is the same in every location you run in Rundoo, so points a customer earns at one of your stores can be redeemed at another.
- **A competitor down the street does not share.** A customer's FanBuilder account is tied to your store. Points they earn at another dealer live in a separate account and cannot be redeemed with you.
- **A coupon is spent when the sale is paid,** not when you click Add. Void the sale before payment and the coupon is still available.
- **Edit in Rundoo, not in FanBuilder.** Rundoo is the source of truth, and changes flow to FanBuilder on their own.