Rundoo

GETTING STARTED WITH RUNDOO · UNBOXING

The Customer App

> How customers check their balance and pay you in the app.

Step-by-step walkthrough ~4 min read Companion to the 4:45 video

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How many times a day does the phone ring and it's a contractor who just wants to know their balance? Or there's a line at the counter and someone wants to settle up their account before they head to the job. It's a real part of the business, but every one of those pulls you away from the customer standing right in front of you. The Rundoo customer app hands that back to your regulars. They check what they owe and pay you from their own phone, no call, no waiting on you.

THE SETUP

Two apps, and the one thing on your end

Search **Rundoo** in the App Store or Google Play and two apps come up. The blue one, **Rundoo POS**, is for you and your staff. The black one, just **Rundoo**, is the one your customers download. Point your regulars to the black icon.



Rundoo, the black icon. This is the customer app. The blue icon is your staff app.

There is exactly one thing you have to do first: put your customer's cell phone number on their contact. Open the customer in Rundoo, go to the **Contact** tab, and make sure their cell is listed. The app signs people in by matching that number, so if it isn't on file, they can't get in. That's the whole setup on your side.

WHAT YOUR CUSTOMER DOES

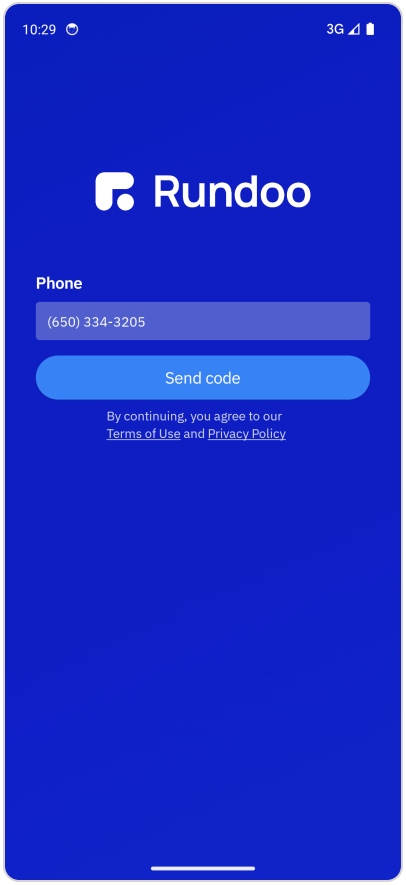
From download to paid, step by step

Here's the exact path your customer walks, so you can talk them through it on the phone or hand them a quick reference at the counter.

1

Download the app and sign in with a text

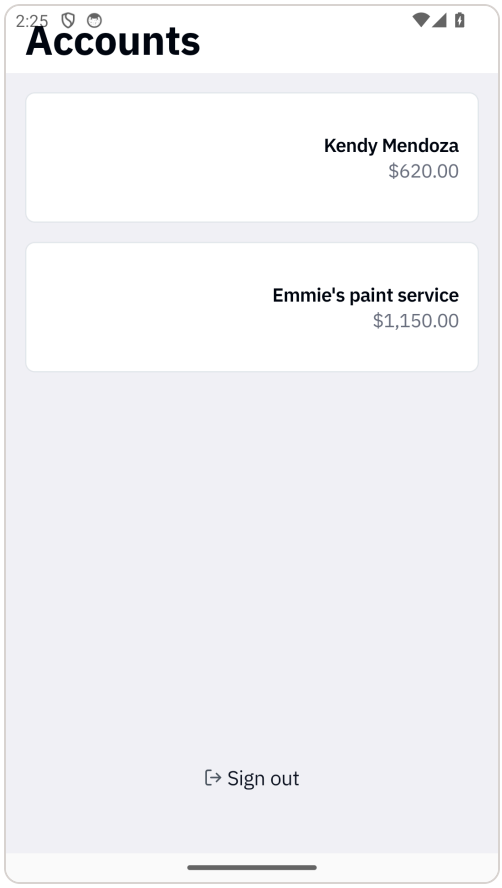
They open the black **Rundoo** app and enter the cell number that's on their record. Rundoo texts a six-digit code, they punch it in, and they're in. No password to forget.



The customer enters their cell number, then the 6-digit code Rundoo texts them.

2 Pick the account (only if they have more than one)

If a contractor's phone is tied to more than one of your customer records, say a personal account and a business one, they see an **Accounts** picker right after sign-in, each with its balance. They tap the one they want for this visit. Someone with a single account just taps their one row and moves on.



The Accounts picker. It re-checks every sign-in, so a newly added account shows up next time.

3 See the balance and every open invoice

Right away they see their total balance, their current statement, and each open invoice. This is the answer to the "what do I owe?" question, and they got it themselves.

4 Pay the bill in a couple of taps

They tap the **profile icon**, then **Pay Balance**. They can tap **Pay Total Balance** to clear the whole thing, or pay specific invoices instead. Then **Continue**, then **Pay**. They add a card once and it saves, so next time it's one tap.

5

It lands on your side instantly

The moment they confirm, the payment shows up in Rundoo as a **Bill payment**, the same as if they'd paid at the counter. It hits your **POS › AR** view and updates their balance within seconds. No double entry, nothing for you to key in.

6

They can help themselves to the rest, too

The app also lets a customer look up any past purchase or receipt, so they don't call you to find out what they bought for a job last spring. They can browse your catalog, check what's in stock, and if you've turned on e-commerce, add items to a cart and place the order right from the app. Online orders drop straight into Rundoo for you to fill.

7

Set it and forget it with autopay

If a customer would rather not think about it, they can turn on **autopay** to settle the statement balance automatically each time a statement runs, and manage their saved cards from the same place.

GET THEM ON IT

The invitation is already in their hands

Every statement Rundoo sends carries a **QR code** and a **Pay in app** button that deep-link straight to the right app store. The monthly statement is your best pitch, because they're already looking at what they owe. There's also a printable counter flyer (English and Español) that walks a customer through downloading, signing in, and paying. Ask your Rundoo guide for a copy and leave a stack by the register.

KEEP IT HANDY

The app at a glance

THE APP **Rundoo (black icon)** The blue icon is your staff app.	YOUR ONE SETUP STEP **Cell on the Contact tab** No cell on file, no sign-in.
HOW THEY PAY **Profile icon → Pay Balance** Total, statement, or specific invoices.	LANDS IN **POS › AR in seconds** As a bill payment. No double entry.

Good to know

- It has to be a cell number, not a landline or office line. The sign-in code comes by text, so an office phone won't receive it.
- If a customer signs in and gets told they don't have an account, their cell just isn't on their record yet. Add it under **Contact** and have them try again.
- If you've turned on e-commerce, the app opens on the **Online orders** shop screen instead of the balance screen. Everything above is still one tap away from there.
- The screens here are Android. iOS looks a hair different, but every step is the same.