Rundoo

GETTING STARTED WITH RUNDOO · PURCHASE ORDERS

From Draft to Ordered

Send it by EDI or email, or mark it ordered yourself.

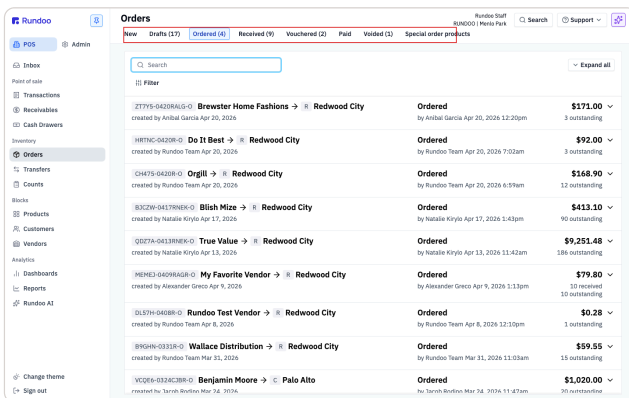
Step-by-step walkthrough   ~3 min read   Companion to the 3:28 video

Last time, you built a draft purchase order and set it aside. Now it's time to actually place it with your vendor. This is the short, satisfying part: pick how the order should reach them, give it one confirming click, and watch it slide out of your drafts and into the Ordered pile, waiting on the truck. Nothing here is scary, and on your practice store nothing goes to a real vendor, so you can send with a clear conscience.

WHERE EVERYTHING LIVES

The Orders tabs are the life of a PO

In **POS** mode, click **Orders** in the left sidebar. Across the top you'll see a strip of tabs, and that strip is the whole story of a purchase order, left to right: **New** , **Drafts** , **Ordered** , **Received** , and on down the line. Your saved work is sitting in **Drafts** , and the goal of this walkthrough is to move it one tab to the right, into **Ordered** . Each tab keeps a live count so you can see at a glance how many POs are in each stage.



The tab strip at the top of Orders is the PO lifecycle. You're moving a PO from Drafts into Ordered.

DO THIS

Place your draft, step by step

1. ### Open your saved draft

   Click the **Drafts** tab. Every PO you've saved but not yet sent lives here. Find the one you built and click it to open it back up in the builder, cart and all, exactly as you left it.

2. ### Pick your order method (the important one)

   On the left side-panel, find the **Order method** dropdown. This is the one real decision on this screen: it tells Rundoo *how* the PO should get to your vendor. It defaults to whatever that vendor is set up for, and you get up to three choices.

   EDI only shows up for vendors wired for electronic ordering, like Orgill, True Value, Do It Best, or Benjamin Moore. You'll spot a little plug icon by their name. Pick this and the order goes straight into the vendor's system, no email needed. It's the fastest, most reliable route when it's available.

   Email is what most vendors use. Rundoo emails a PDF of the PO to the vendor's **Orders email** , which shows right under the vendor's name so you can see exactly where it's headed.

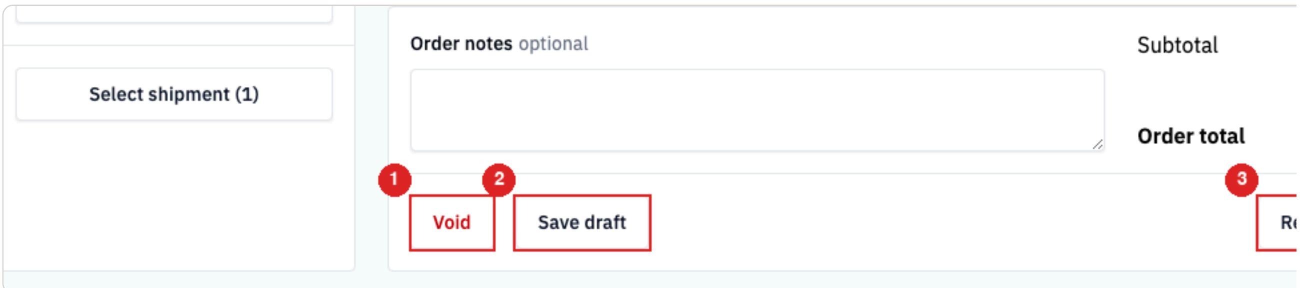
   Mark ordered sends nothing at all. Use it when you'd rather place the order yourself, by phone or on the vendor's own website. Rundoo still tracks the PO for you; it just leaves the sending in your hands.

3 Confirm the ship-to location

Glance at **Ship to** on the left panel. It defaults to your current store, which is right for most orders. Only change it if the stock is going somewhere else, like another location or a customer's job site. The **Requested delivery date** just below it is a target for the vendor, and defaults to ASAP.

4 Click Order

Down in the bottom-right action cluster you'll see four buttons. **Void** and **Save draft** are your back-out options, **Receive** is for logging stock later, and the blue **Order** button is the one you want. Click it. Rundoo fires off the order using the method you chose and drops a green confirmation banner at the bottom of the screen.



The action cluster at the bottom right. The blue Order button places the PO with your vendor.

5 Find it in the Ordered tab

The PO now leaves your **Drafts** and lands in **Ordered**. Watch the counts: Drafts ticks down by one, Ordered ticks up by one. Click the **Ordered** tab and there's your PO, sitting in the waiting room. "Ordered" simply means it's with the vendor now, and you're waiting on the truck. You've done your part.

KEEP IT HANDY

The three order methods at a glance

EDI **Straight into their system** Integrated vendors only. Look for the plug icon.	EMAIL **A PDF to their Orders email** The everyday choice for most vendors.
MARK ORDERED **You place it yourself** Sends nothing. Rundoo just tracks it for you.	WHAT "ORDERED" MEANS **Sent. Waiting on the truck.** It sits in the Ordered tab until you receive it.

Good to know

- If a vendor has no EDI and no Orders email on file, the **Email** option won't appear and you'll get a yellow banner telling you to add one in Vendors › the vendor › Settings, or just use **Mark ordered** instead.
- Nothing happen when you click Order? Double-check you've got a vendor picked and at least one product on the cart. Rundoo won't send an empty PO, and it won't nag you either, the button just sits still.
- Changed your mind after sending? **Void** only works while a PO is still a draft. Once it's in Ordered, back it out by receiving it with the quantities set to zero, then call or email the vendor to cancel, since Rundoo doesn't notify them for you.