Rundoo

GETTING STARTED WITH RUNDOO · TRANSACTIONS

Item Sets (Grouping a Sale)

> Split one sale into named sets, each with its own total.

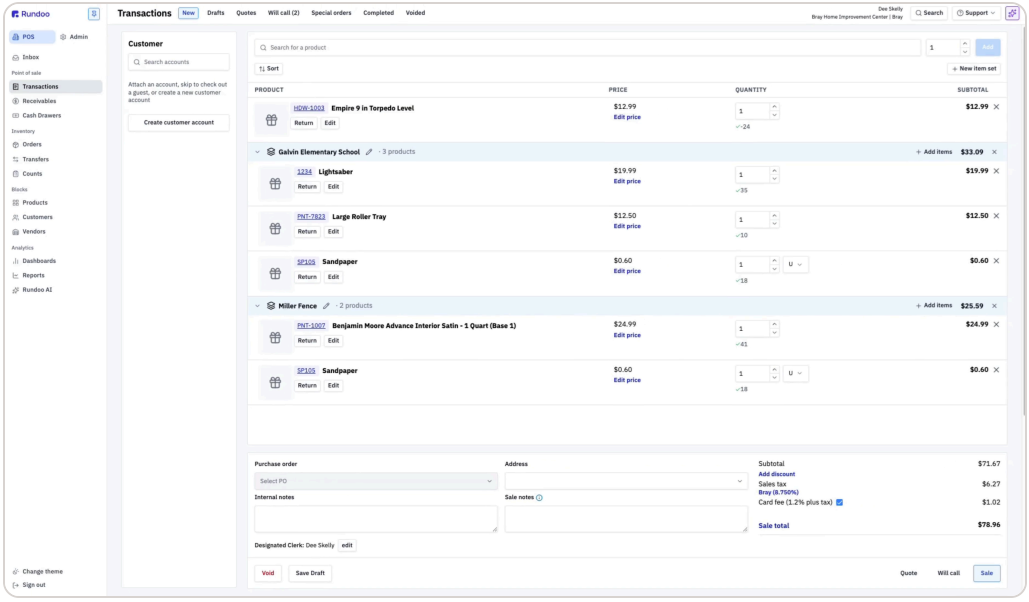
Step-by-step walkthrough ~3 min read Companion to the 4:27 video

A contractor walks in buying for two different job sites, but wants it all on one ticket. He still needs to know which materials went to which job so his own billing stays clean. Item Sets handle that right on the sale: you split one order into named groups, each with its own subtotal, and those groups travel with the ticket all the way to the receipt. No sorting a big pile of line items at the end.

THE IDEA

One sale, groups that keep themselves straight

An Item Set is just a named group of lines inside one sale, like "Galvin Elementary School" and "Miller Fence." You name a set, and whatever you ring up next drops straight into it. When you switch to a different set, new items land there instead. Anything you sell that belongs to neither job stays ungrouped at the top of the cart. Set the groups once as you go, and Rundoo keeps them organized from the first scan to the printed receipt.



One sale, two named sets. The ungrouped line sits on top, each set carries its own subtotal, and the active set is marked "Selected."

DO THIS

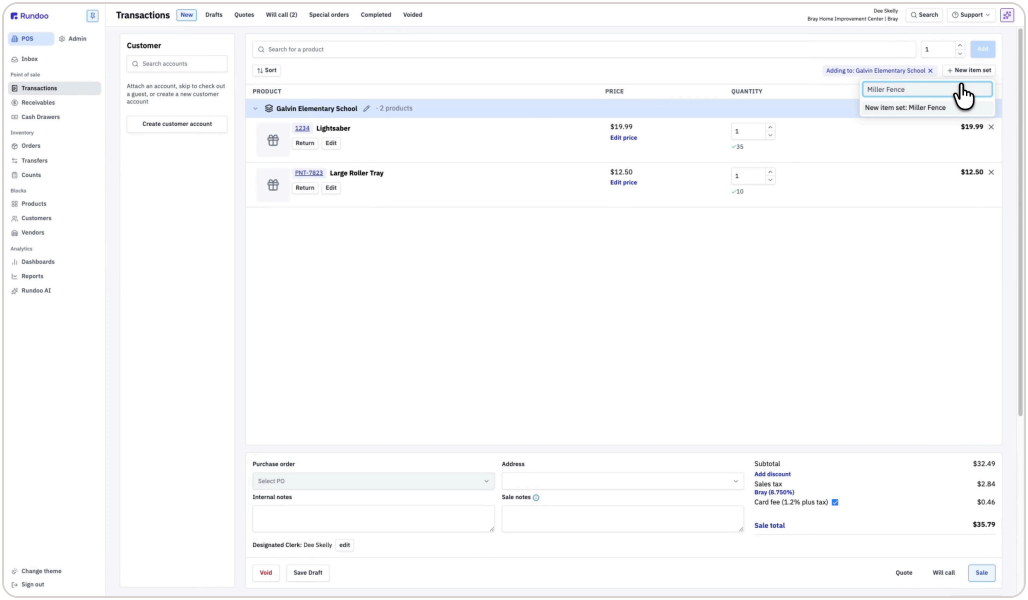
Group a sale, step by step

1 Start the sale

Open a new sale under **POS** → **Transactions** → **New**. Attach the customer on the left if you want, the same as any other ticket. You do not have to decide about sets ahead of time. You can start grouping whenever you like.

2 Create your first set

Up above the cart, click **New item set**. Type the name of the first job, say "Galvin Elementary School," then choose **New item set: Galvin Elementary School**. A header row appears for that group, and a blue **Adding to: Galvin Elementary School** tag pins to the top of the cart. That tag is your reminder that anything you add now goes into this set.



Click New item set, type a name, and pick "New item set: <name>" to create the group.

3 Ring up the items for that job

Search and add products the way you always do. Each one lands under the active set automatically, indented beneath its header. No dragging, no sorting at the end. Everything stays organized right from the start.

4

Create a second set and switch to it

Click **New item set** again, type "Miller Fence," and create it. Notice the blue tag switches over. Miller Fence is now the active set, so the items you add next land there instead. To jump back to an earlier set, click **Add items** on that set's header. The active set always reads **Selected**.

5

Sell something for neither job, or the same item for both

If the customer grabs something for themselves, like a level, click the **X** on the "Adding to" tag first so no set is active, then ring it up. It sits on its own at the top, above the sets. And if a product is needed for both jobs, like a primer, just make the right set active and add it to each. Rundoo keeps them as two separate lines, one per job.

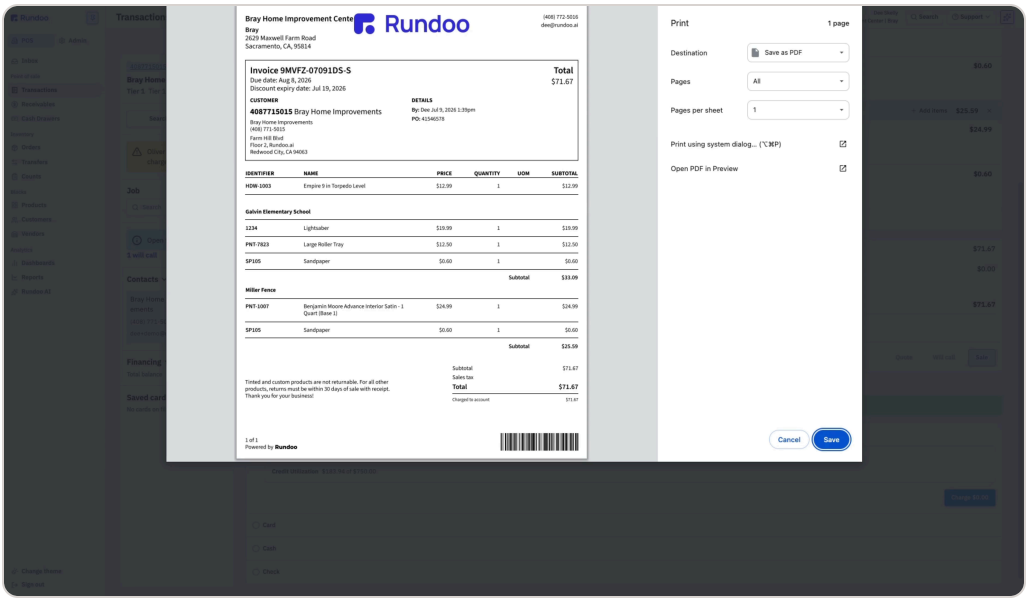
6

Fix a mistake: remove a line vs. remove a set

These two X buttons do different things, so it is worth knowing which is which. The **X** next to a single line **deletes that item from the sale completely**. The **X** on a set's header only removes the group. It asks you to confirm, then the items themselves are safe. They just move back up to the ungrouped top of the cart. Nothing is lost. To rename a set, click the pencil on its header.

7 Save it, and see the groups travel

Save the ticket as a quote, draft, or will-call from the bottom of the screen, and every set comes along (empty sets quietly drop off). When you take payment and print the receipt, each set prints as its own section with its own subtotal, exactly what your contractor needs to bill each job. The groups keep riding with that sale into the completed record, returns, and special orders too.



On the receipt, each set gets its own labeled section and subtotal, so every job bills out clean.

KEEP IT HANDY

Item Sets at a glance

CREATE A SET

New item set → type a name

It becomes the active target right away.

SWITCH SETS

Add items on a header

The active set reads "Selected."

UNGROUPED ITEM

Clear the "Adding to" tag

It rides on top, above every set.

ON THE RECEIPT

One section per set

Each with its own subtotal.

Good to know

- The line's X deletes the item. The header's X only ungroups. When in doubt, use the header X, since it never loses anything from the cart.
- The same product can live in two sets as two separate lines. Adding it again within one set just bumps that line's quantity.
- Ungrouped lines always show above the set headers, so a "loose" item is easy to spot before you take payment.
- Practice this in your training store first. Build a test order with a couple of sets and move things around. None of it touches your real books.