Rundoo

GETTING STARTED WITH RUNDOO · STATEMENTS

How the Bill Looks and Lands

> Set each customer's statement format, then mail it, email it, or charge it automatically.

Step-by-step walkthrough ~3 min read Companion to the 3:21 video

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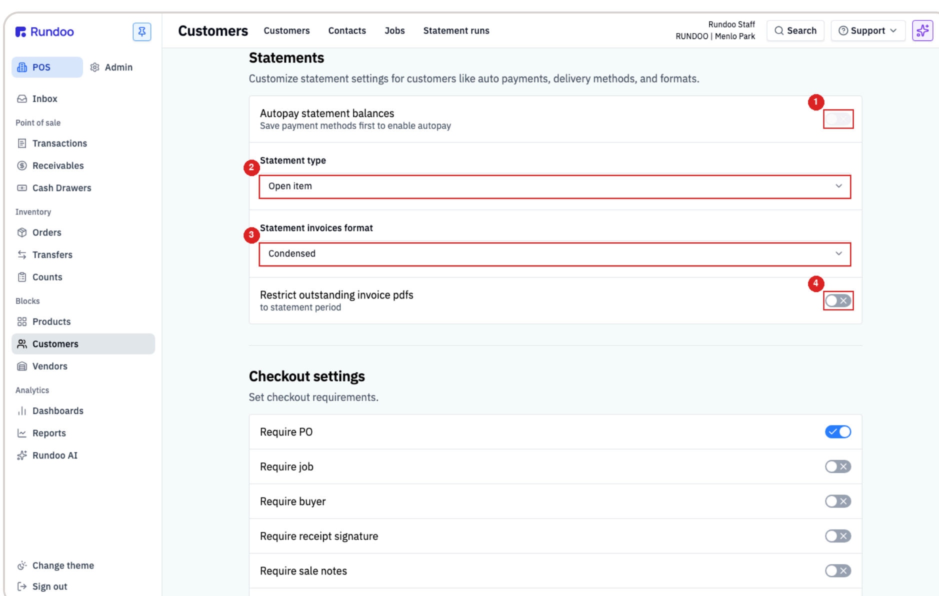
No two charge customers want their bill the same way. One contractor just wants a clean list of what's still open, another wants the full running ledger. One pays by card without you lifting a finger, another wants a paper copy in the mailbox. In Rundoo you set all of that once, per customer, on their Settings tab. After that, every statement run just follows the rules you laid down.

WHERE THESE SETTINGS LIVE

The Statements section on a customer

These are per-customer settings, so they live on the customer, not in company settings. From **POS** mode, click **Customers** in the left navigation, open a charge-account customer, and click the **Settings** tab. Scroll down past the Financing section and you'll find **Statements**. That one panel holds how this customer's bill is paid, delivered, and formatted.



Customers → open a customer → Settings → scroll to Statements. The four controls that shape their bill.

DO THIS

Set up one customer's statements

1

Open the customer’s Statements section

Click **Customers**, open a contractor or anyone who carries a balance, then click their **Settings** tab. Scroll down a bit, right past the Financing section, to **Statements**.

2

Charge it automatically with Autopay

If the customer wants their balance handled hands-off, flip on **Autopay statement balances**. When a statement runs, Rundoo charges their saved card or bank for the balance. You need a card or bank account saved on the customer first (in the Cards or Bank Accounts sections just above), otherwise the toggle stays greyed out with a reminder to save a payment method.

3

Mail a paper copy

For a customer who likes paper, turn on **Mail statements**. Just make sure they have a mailing address saved in the General section of their profile, and Rundoo will pull them into the print pile when you run statements.

4

Email it, per contact

Email is set a little differently. It’s per contact, not one switch for the whole customer. Scroll up to the **Contacts** list on the same profile, click the person who should get the bill (usually whoever handles the money), flip on **Email statements** for them, and Save. Turn it on for as many contacts as you need.

5

Pick the statement type

Back in the Statements section, open **Statement type**. **Open item** is the default and the most common: it lists just the invoices still open at the end of the period, so the customer sees exactly what they owe. **Balance forward** shows the full running ledger, a starting balance plus every invoice, payment, and credit in the period. Most stores stick with Open item unless a customer asks for that running history.

6 Choose how much invoice detail to attach

Open **Statement invoices format** to decide whether copies of the invoices ride along with the statement. **None** sends just the summary page. **Full page** attaches every invoice on its own sheet. **Condensed** is the paper-saver, fitting several invoices onto a page. If this customer is on Open item, you can also switch on **Restrict outstanding invoice PDFs to statement period** so the attached copies stay clipped to the current period.

KEEP IT HANDY

The Statements settings at a glance

WHERE **Customers → open customer → Settings** Scroll past Financing to the Statements section.	STATEMENT TYPE **Open item or Balance forward** Open item shows what's still owed; Balance forward is the full ledger.
INVOICES FORMAT **None, Condensed, or Full page** Condensed fits several invoices on one page.	DELIVERY **Autopay, Mail, or Email** Autopay and Mail on Settings; Email is per contact.

Good to know

- Autopay needs a saved card or bank on file, and Mail needs a saved address in the General section. Set those first, or the delivery won't have anywhere to go.
- Email is set on each contact, so you can bill the AP person and skip the owner. A customer with no contact email gets skipped from the email run, so hand or mail them a copy instead.
- Restrict outstanding invoice PDFs to statement period is offered on Open item statements only.
- A good default: start a new charge customer on Open item, and only switch to Balance forward if they ask for the running history.
- Company-wide rules like your statement day and envelope type live in Admin, not here. This tab is just the per-customer overrides.