Rundoo

GETTING STARTED WITH RUNDOO · TRANSACTIONS

Money Down on Anything

> Add in-stock items to a special order, take a deposit, and hand it over in pieces.

Step-by-step walkthrough   ~4 min read   Companion to the 4:56 video

A customer is putting in an order you have to bring in, but while they are at the counter they grab a couple of things off your shelf too, and they want to put money down on the whole lot today. Up to now a special order ticket only held the items you were ordering in. That just changed. Now you can drop any product onto a special order, take a deposit on it, add a discount, add a return, and hand over part of the order whenever the customer is ready, all on one ticket.

WHAT IS NEW

One ticket now holds everything

Before, an in-stock item could not ride along on a special order. You would have split it into its own separate sale. Now you create the special order first, then from that saved order you add any product: things off your shelf, a discount, even a return. Take one deposit that covers the whole lot, and hand the order over in pieces as the customer comes back for it.

DO THIS

Build the ticket, deposit and all

1. **Start the sale and add the special-order item**

   In **POS** open **Transactions**, start a **New** sale, and attach the customer first. That is who you will call when the order lands. Search for the product you are bringing in. Because it is flagged special orderable, Rundoo opens it as a special order right there: set your price and cost, jot down anything the vendor needs, and click **Add**.

2 Save it, and it becomes a special order

Save the sale. Because you are ordering that item in, Rundoo double-checks it is fine for the count to go negative, so click **Confirm**. The order now lives under the **Special orders** tab. This is the key part: you build the rest of the ticket from this saved special order, not from a fresh sale.

3 Open the special order and add your in-stock items

Open the special order and click **Edit**. This is the new part: from here you can drop any in-stock item, say a paintbrush, right onto the same ticket. It is not a special-order item, but it rides along now, and you will see the subtotal and total climb. Before, an in-stock item could not ride on a special order, you would have split it into its own sale.

4 Take a deposit

Now they want to put money down. On the special order, click **Deposit**. A deposit is money held against the order, it is not paying off a balance, it just sits on the ticket until they come back for their goods. Rundoo may fill in a default amount, and you can change it right at the counter. Take it by any tender, cash, card, check, ACH, or gift card.

5 Add a discount

You can knock a discount onto a special order now too, which you could not do before. Say you are giving them a little off for the trouble of waiting. Add it to the order, save, and it holds on the ticket.

6 Add a return, and refund any extra deposit

They are also bringing back a gallon of primer. Add it as a **Return** product right on the special order, click **Add a return**, and link it to the original sale so it stays tied together (there is an unlinked option too), then jot a quick note on why. If the return drops the order below what they have already put down, Rundoo stops you and asks you to refund the extra deposit before you save. Refund just what it asks for, save, and the return is on the order.

7

Partially close out what they take today

Say they want to grab the paintbrush today and pick up the rest when it lands. In Rundoo that is a close out. Go into **closeout** mode, put in the quantity they are taking, process it, and charge. That part of the order is handed over and moves to **Completed**, the rest stays on the ticket, and since they already have money down, there is nothing more to collect right now.

8

Close out the rest when it arrives

When the rest of the order comes in and they are back for it, open the ticket from **Transactions** → **Special orders**, go into **Closeout**, make sure they have everything, and charge the remainder. The whole thing lands in your **Completed** tab. Done.

KEEP IT HANDY

The new moves at a glance

ADD ANY PRODUCT **Special orders → Edit** Drop in-stock items and returns onto the same ticket.	TAKE A DEPOSIT **Deposit control on the ticket** Money held against the order. Any tender.
HAND IT OVER IN PIECES **Closeout mode → quantity** Close out what they take today, the rest stays on.	FINISH IT **Closeout → charge the remainder** The whole sale lands in Completed.

Good to know

- The in-stock items and returns you add will not show up on your Buyers list. That list is for the goods you are actually ordering in from a vendor, so it stays clean.
- A deposit is not a payment against a balance. It sits on the ticket as money down until the customer picks up their goods.
- There still needs to be a special-order item on the ticket to take a deposit. You cannot take a deposit on a pure in-stock cart yet, and you still cannot special-order a stock item directly.
- Coming next: deposits and partial pickups on drafts, quotes, and will-calls too, not just special orders.
- Best way to get the hang of it: run one start to finish in your practice store. Nothing in there is live. If anything feels off, tell your Rundoo guide, that is exactly the feedback we are after right now.