GETTING STARTED WITH RUNDOO · SETUP

Open a House Account

Add a customer, then set a finance term to let them charge on their tab. The finance term is the only switch there is.

THE THREE SETTINGS THAT MATTER

1

Pricing tier

Set on the Add customer form. Defaults to retail.

Pick the contractor tier

2

Finance term

The switch that makes them a charge account.

Net 30 Statement

3

Credit limit

Caps the tab. Blocks charging when exceeded.

The amount you agreed on

Do it in 4 steps

1. POS → **Customers** → **Add customer** (top-right).
2. Enter **Phone** + **Name**, set the **Pricing tier**, click **Save & Edit**.
3. **Settings** tab → **Financing** → set **Finance term** to a Statement term.
4. Click **edit** on **Credit limit**, enter the cap, save. Done.

Retail vs. charge

Finance term = Cash? Retail.

A **Statement** term makes them a charge account and unlocks the **Charge account** tender at POS.

No Charge account button at checkout? Check the customer's Finance term first. It's almost always still set to Cash. There's no separate charge-account toggle to find.

Watch for duplicates: a repeat phone number makes a plain Save close with no record created, no error. Search the list first, or use Save & Edit so you'd notice.