Rundoo

GETTING STARTED WITH RUNDOO · SETUP

Open a House Account

> Add a customer and set them up to charge on their tab.

Step-by-step walkthrough ~3 min read Companion to the 2:52 video

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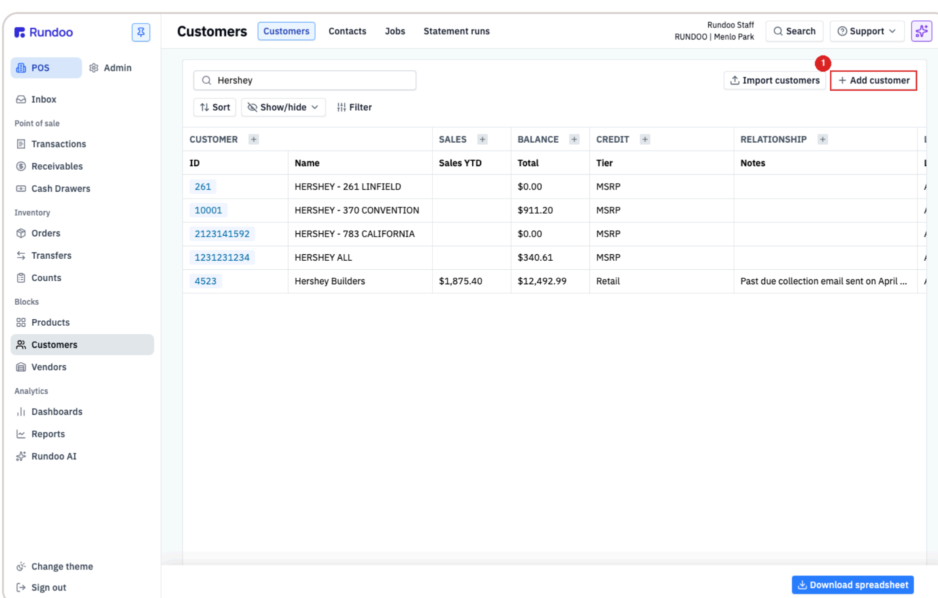
You know your best customers by name. So when a regular you trust, say a local contractor, asks if they can start putting their materials on a tab, you want to set that up right the first time. Opening a house account in Rundoo is two moves: create the customer, then give them a finance term. This is the fuller setup, with pricing, a charge term, and a credit limit. If you just need a quick counter add for a walk-in, the "Adding a Customer" video has you covered.

THE ONE THING TO REMEMBER

There is no charge-account toggle

Every new customer starts as retail (they pay at the counter every time). What turns them into a charge account is one field: their **Finance term**. Leave it on **Cash** and they stay retail. Switch it to a statement-based term like **Net 30 Statement** and Rundoo treats them as a charge account, which is what makes the **Charge account** button appear at checkout. Keep that in your back pocket and the rest of this is just filling in the blanks.



Everything starts from the Customers list. The Add customer button is up in the top-right.

DO THIS

Open a house account, step by step

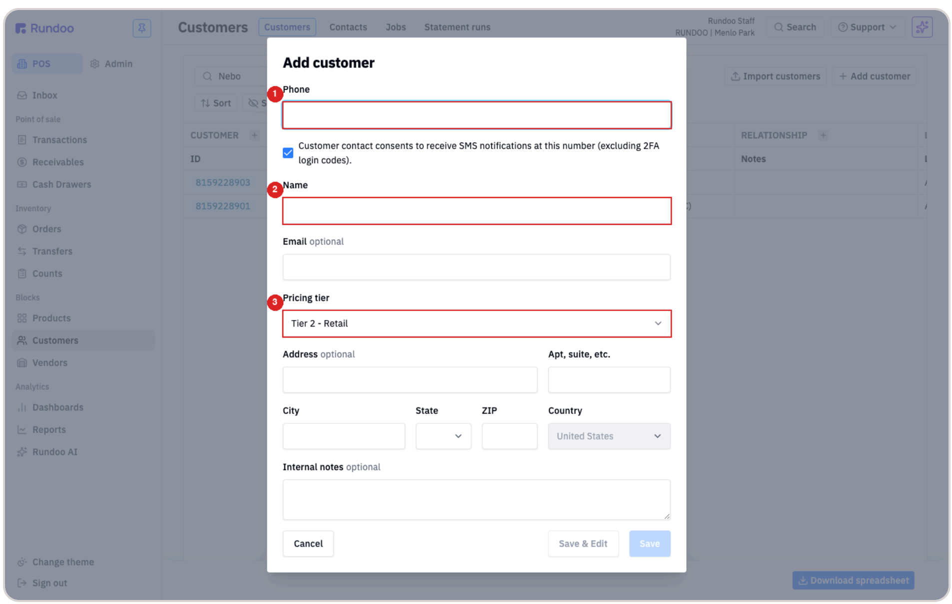
1 Open your customer list

In the left sidebar, make sure you're in **POS**, then click **Customers**. This is your whole customer book. Up in the top-right, click **Add customer** to open the new-customer form.

2 Fill in their details

Only two fields are required, **Phone** and **Name**, so you can move fast. Type the phone number and the business name (for example, Riverside Contracting). Email and address are optional and can wait.

The one field worth a second look is **Pricing tier**. It defaults to your standard retail tier, so if this is a contractor who's earned better pricing, pick the right tier now and they'll see the correct prices from their very first sale.



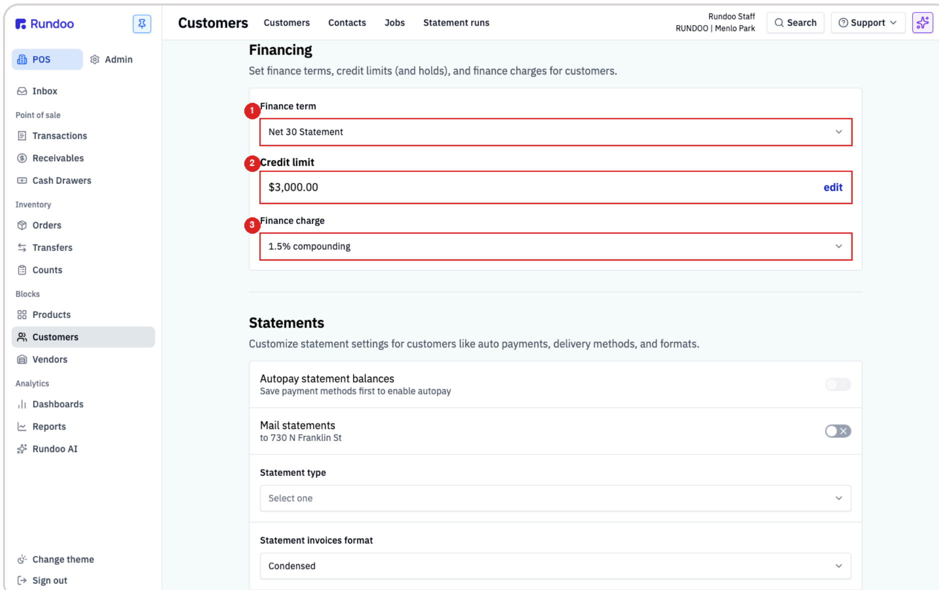
Phone and Name are required. Set the Pricing tier before you save so pricing is right from day one.

3 Save with Save & Edit

You get three save buttons. **Save** just creates the record and closes the window, which is perfect for a plain walk-in. **Save & New** reopens a blank form, handy when you're adding several people in a row. For a house account, use **Save & Edit**. It creates the record and drops you right onto their full profile, which is exactly where the charge-account settings live.

4 Set the Finance term

This is the important one. On the customer's profile, click the **Settings** tab and scroll to the **Financing** section. Open the **Finance term** dropdown (it reads **Cash** by default) and pick a statement-based term such as **Net 30 Statement**. That single change makes them a charge account. There's no other switch to flip, and it saves on its own.



The Financing section: Finance term is the switch. Credit limit and Finance charge sit right below it.

5 Set the credit limit

In the same **Financing** section, click **edit** next to **Credit limit** and enter the amount you and the customer agreed on, then save. This caps how much they can owe at once. If a sale would push their balance past the limit, Rundoo blocks the **Charge account** tender at checkout until they pay some down, so you find out at the counter, not at month-end.

6 Add a finance charge if you charge interest

One field down is **Finance charge**, the interest applied to overdue balances (a common setting is **1.5% compounding** monthly). If you don't charge interest, just leave it on **Select one**. That's it. Your customer is in the system, priced right, and ready to charge.

KEEP IT HANDY

House account at a glance

CREATE **POS → Customers → Add customer** Phone and Name required. Set the Pricing tier.	THE CHARGE SWITCH **Finance term** A Statement term makes them a charge account. Cash keeps them retail.
CREDIT LIMIT **Settings → Financing → edit** Caps the unpaid balance. Blocks Charge account when exceeded.	BEST SAVE BUTTON **Save & Edit** Takes you straight to the profile to set the finance term.

Good to know

- Duplicate phone numbers fail quietly. If the number is already on another customer, a plain Save just closes the window with no record created. Search the list for the phone first, or use Save & Edit so you'd notice the missing profile.
- No Charge account button at checkout for someone who should have a tab? Check their Finance term first. It's almost always still set to Cash.
- To put an account on a short hold, set the Credit limit to $0.00. Their tab is blocked at POS, but they can still pay by cash or card and everything else keeps working.