Rundoo

GETTING STARTED WITH RUNDOO · TRANSACTIONS

The Transactions Screen (Tour)

> A quick tour of Transactions, your new counter.

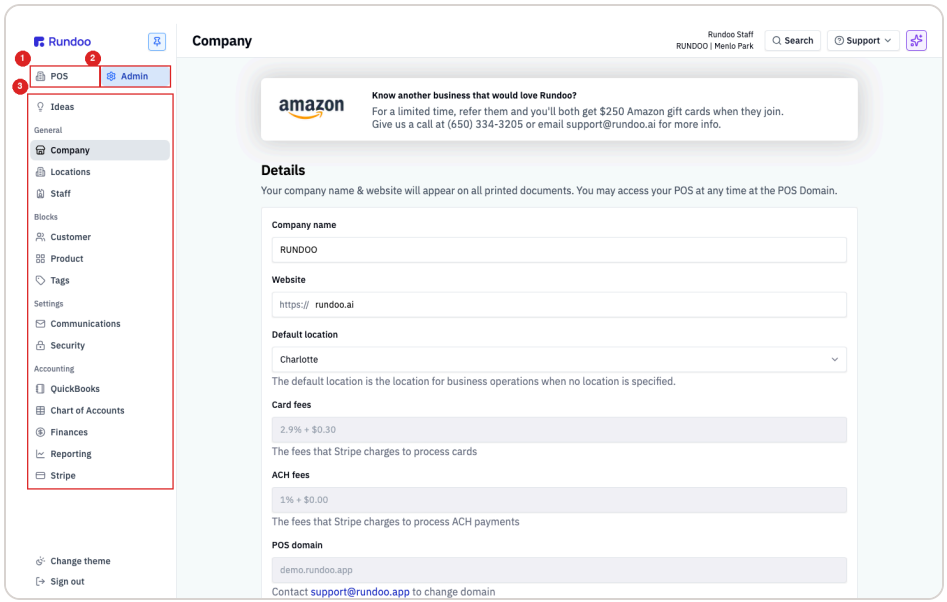
Step-by-step walkthrough ~2 min read Companion to the 1:45 video

You already know how to ring up a sale. So this first tour isn't about the how, it's about the where. In Rundoo, every sale you make starts in one place called Transactions. Once you know where it lives and how the screen is laid out, day one at the counter feels a lot less like a new system and a lot more like your old counter with better tools.

TWO SIDES TO RUNDOO

POS is your home base

At the very top of the left sidebar you'll see two buttons, **POS** and **Admin**. Think of them as two sides of the same store. **POS** is your day-to-day register, where you ring up sales. **Admin** is the back office, where an owner or manager sets things up. For selling, you'll live in **POS**. Switching sides only swaps the sidebar; the header up top and the location you're signed into stay right where they are.



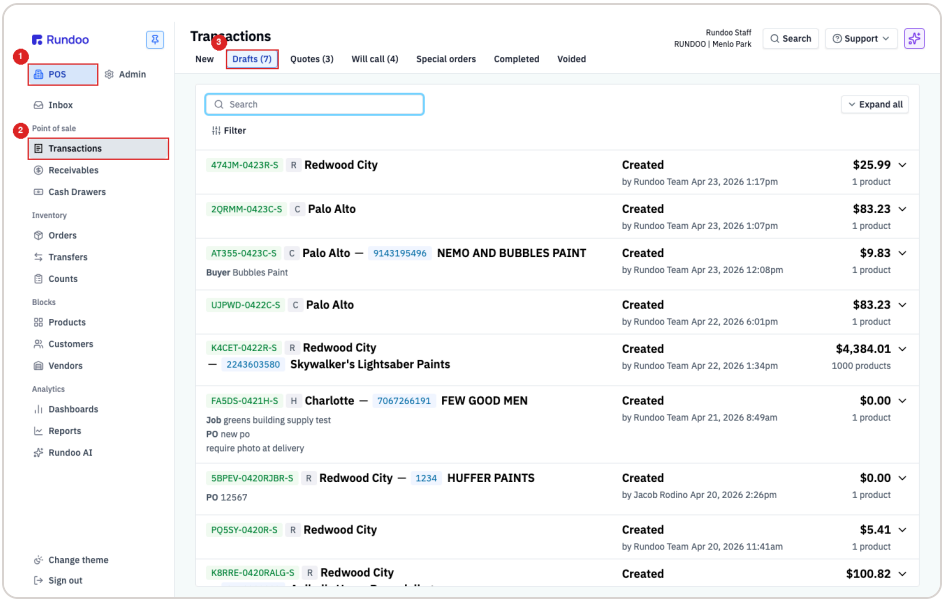
POS and Admin sit at the top of the left sidebar. All your selling happens on the POS side.

DO THIS

Take the tour, step by step

1 Open the Transactions screen

On the **POS** side, look down the left sidebar to the **Point of sale** group and click **Transactions**. This is your counter. Every sale you make, whether you finish it now or set it aside, lives on this screen.



POS → Point of sale → Transactions. The row of tabs across the top holds each kind of sale.

2 Read the tabs across the top

Along the top of the screen is a row of tabs, one lane for each state a sale can be in. **New** is where you start a fresh sale. **Drafts** are sales you saved to come back to. **Quotes** are your priced estimates. **Will call** is orders set aside for pickup. A little further along you'll find **Special orders**, **Completed**, and **Voided**. You'll get to those when they matter, so for now just know it all lives right here.

3 Don't sweat the numbers in parentheses

Some tabs show a count, like **Drafts (7)** or **Will call (4)**. That's just a live tally of what's sitting in that lane right now, and it moves as your store works through the day. It isn't part of the tab's name.

4

Learn the two-panel layout

Start a **New** sale and the screen splits in half. The **left** side is the customer, who you're selling to. The **right** side is the transaction itself, the cart, what's on the ticket, and the total. Customer on the left, sale on the right. That split doesn't change from screen to screen, so once it clicks, everything in Rundoo starts to feel familiar.

5

That's the lay of the land

You can now find the Transactions screen, name the tabs, and read the two-panel layout. That's everything this tour set out to do. In the next video we'll start on the left side and get the right customer onto the sale.

KEEP IT HANDY

The tabs at a glance

NEW **Start a fresh sale** Your default when someone steps up to ring out.	DRAFTS **Saved to finish later** Park a sale and come right back to it.
QUOTES **Priced estimates** Give a price now, turn it into a sale later.	WILL CALL **Set aside for pickup** Orders held and waiting to go out the door.

Good to know

- Rundoo names any spot the same way: mode, then left tab, then top tab. So "POS → Transactions → Drafts" means the POS side, Transactions in the sidebar, the Drafts tab up top.
- A count like **Drafts (7)** is live, not part of the name. It tells you how many sales are waiting in that lane right now.
- Nothing on this tour changes your real numbers, so poke around your practice store and get comfortable before the first customer walks in.