GETTING STARTED WITH RUNDOO · TRANSACTIONS

Taking a Bill Payment

Take a charge-account customer's payment in POS → Receivables → Payment, and land it on the right invoices.

TWO WAYS TO APPLY IT

1

Oldest bills first

They just want a flat amount on the account.

Enter amount → Select oldest

2

A specific job / PO

They're clearing certain invoices.

Check rows → Match allocated

3

Overpayment

Their check is more than they owe.

Credit to add + a note

Take a payment in 4 steps

1. POS → **Receivables**, on the **Payment** tab.
2. **Search accounts** and pick the customer.
3. Apply it: **Select oldest**, or check rows + **Match allocated**.
4. Pick a tender, then **Accept** the payment.

Tenders

Cash · Check · Card

Check logs a **check number**. The commit button names the amount: **Accept $500.00 check**.

Amount must equal Allocated. A payment won't accept until the two match. The **Statement balance** pill sets the amount to the last statement in one click.

A discount is not a write-off. Take the payment for what they actually paid, then issue a separate credit on the account. And write-offs can't be voided or refunded, so get manager sign-off first.