Rundoo

GLANCE CARD

GETTING STARTED WITH RUNDOO · STATEMENTS

Ready to Bill

The statement settings to dial in before your first run. All of them live in Admin mode.

WHERE EACH SETTING LIVES

1

Statement message

The note that prints atop every statement. One per location.

Admin → Locations

2

Terms & charges

When balances are due, plus interest on overdue ones.

Admin → Customer

3

Company defaults

Statement day, envelope, credits, double-sided.

Admin → Communications

Set it up in 4 steps

1. Under **Locations**, type your **Statement message** and Save.
2. Under **Customer**, add a **finance term**: Reference date **Statement**, Net due days 30.
3. Add a **finance charge** for overdue balances. Assign it only where you mean to.
4. Under **Communications**, set your **Statement day**, envelope, and toggles.

Sensible starters

Term: Net 30 Statement (due 30 days after the statement)

Charge: 1.5% compounding, the industry-standard rate

Statement day: the 20th by default, or End of month

Default term: make it Cash, so no accidental charge accounts

The one to remember: finance charges assess automatically during a statement run, only on balances past due. There’s no separate button, and Rundoo does the math. So only assign a charge to the customers meant to have one.

Set your own rate: Rundoo applies whatever percent you enter and does not enforce usury caps. Check with your accountant if you’re unsure what your state allows.