Rundoo

GETTING STARTED WITH RUNDOO · REPORTING

Reports That Answer Back

> Open a report, set the date and columns, and export what you find.

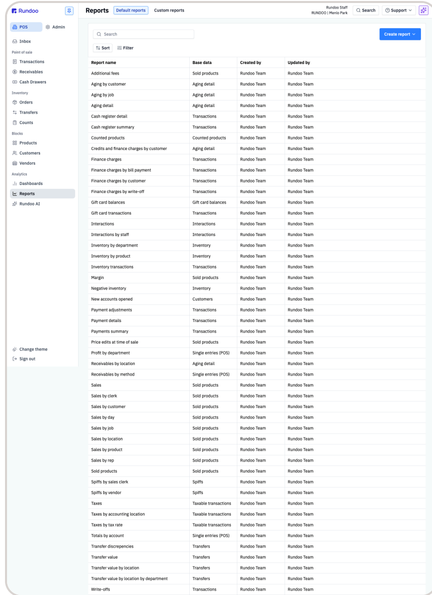
Step-by-step walkthrough ~3 min read Companion to the 2:40 video

You know your business inside and out, and every day you ring up sales you are building a rich history of what your customers buy, and when. Sometimes you just want a quick answer out of that history. Who were my top ten customers this month? Which department had the best margin? Rundoo's Report Builder is how you ask those questions and get the answer in a few clicks. This guide is about running a report to get an answer right now. Saving one you will want again is the next video, Your Own Reports.

WHERE IT LIVES

Finding your reports

In **POS** mode, look in the left sidebar for the **Analytics** group, then click **Reports**. You land on a searchable list of every report Rundoo ships with, dozens of them already built for you. Each row shows its **Base data**, which is the part of your business it pulls from, like Sold products, Aging detail, or Transactions.



POS mode → Analytics → Reports. Search or scroll the list, and each report shows the Base data it pulls from.

If you do not see **Reports** in the sidebar at all, that is usually a permission setting. Ask your management team to check your staff role.

DO THIS

Run a report and get your answer

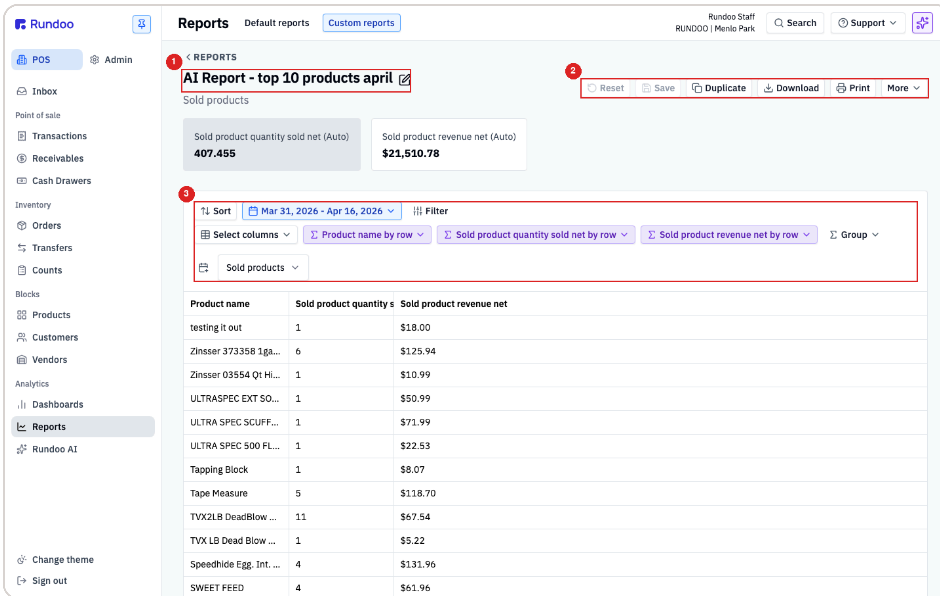
1. ### Open the report that fits your question

   Type into the **Search** box or scroll to find the report closest to what you are asking. For a customer question, **Sales by customer** is a good one to start with. Click its row and it opens in the builder.

2

Check the date range first, every time

When a report opens it comes with a standard set of columns and a date range already applied. The date is the first thing to check, because a report can open on a narrow window like Today and make your numbers look low. Click the colored **Date range** pill and pick the window you want. There are presets for **Today**, **Month to date**, **Year to date**, and **All time**, plus a custom range. The report updates as soon as you choose.



Everything you shape a report with lives on one row of pills. The totals sit up top, and the export buttons are in the top-right cluster.

3

Add the columns you care about

Say you want to see profit, not just sales. Click the white **Select columns** pill and check the fields you want, like **Gross profit**. Only the columns you pick show up, so you can keep the report to exactly what you need to read.

4

Filter down to the slice you want

If you only want to look at one part of the business, click **Filter**, then **Add filter**, and choose an attribute like a location, a clerk, or a product category. Pick a value and the report narrows to just that slice. The list of things you can filter on depends on the report, so if the one you want is not there, that report does not track it.

One thing worth knowing: clicking a column heading sorts the report, it does not filter it. Filtering is always done from the **Filter** button.

5

Read the totals, then export

Your grand totals are always right at the top of the report, in the summary tiles. When the numbers are what you need, head to the action cluster in the top right. Click **Download** for a full spreadsheet you can open in Excel, or **Print** for a clean PDF you can hand to someone.

KEEP IT HANDY

Report Builder at a glance

WHERE **POS → Analytics → Reports** Dozens of default reports, ready to run.	SHAPE IT **Date range · Select columns · Filter** Set the date first, then add columns and narrow.
EXPORT **Download (CSV) or Print (PDF)** Top-right action cluster of the report.	ROW LIMITS **1,000 on screen · 50,000 in the CSV** Totals up top always count every row.

Good to know

- The on-screen table shows the first 1,000 rows to stay fast, but the totals at the top count every row. Need all the rows in a spreadsheet? Download ships up to 50,000. Past that, tighten the date range or add a filter.
- Reports do not email themselves on a schedule. To get a report to someone, Download it, Print it, or send them the link, which drops them right into the same view.
- Different reports open on different default date ranges, so glance at the date pill before you trust a number.