Rundoo

GETTING STARTED WITH RUNDOO · SETUP

Rundoo Loyalty Program

> Built into your point of sale. Set your rules once, then customers earn and redeem right at the register.

Step-by-step walkthrough ~6 min read Companion to the 10:18 video

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Every store has regulars who will always come back. A loyalty program gives everyone else a reason to. Rundoo's is built right into your point of sale, so there is no separate app, no extra monthly fee, and nothing to reconcile at the end of the month. You set the rules once, and the register does the rest.

One naming note

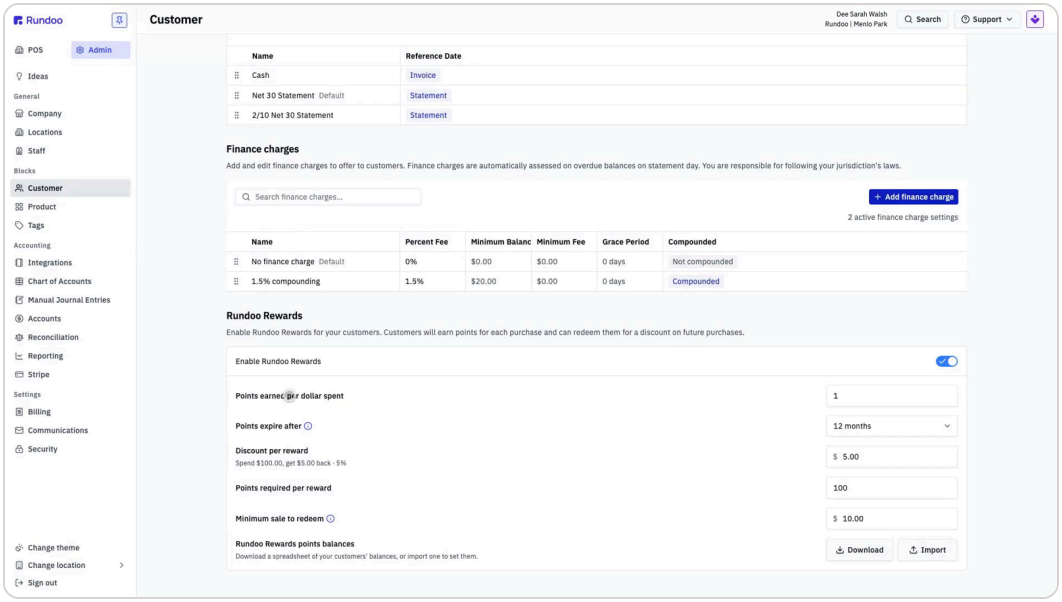
- On screen, the program is still labeled **Rundoo Rewards** (the admin section, the customer tab, and the reward on the sale). It is the same Loyalty Program described here, and the label is changing soon so you can name it for your own store.

SET IT UP

Turn it on and set your rules

1 Flip on the program

Switch to **Admin**, open **Customer**, and scroll to the **Rundoo Rewards** section. Turn on **Enable Rundoo Rewards**.



Admin, Customer: the toggle and the five rules live in one section.

2 Set your own rules

Fill in the fields under the toggle. **Points earned per dollar spent** starts at 1. **Discount per reward** and **Points required per reward** decide what a reward is worth, for example 100 points for $5.00 off, taken before tax. Rundoo spells out the math right there (Spend $100.00, get $5.00 back, 5%), so you always know what you are giving away.

Then set a **Minimum sale to redeem** and pick **Points expire after**: anywhere from 3 months to 2 years after the customer's last purchase, or never.

3 That's it, you're live

There is no Save button. Changes save on their own, so once the toggle is on and your rules are set, customers start earning.

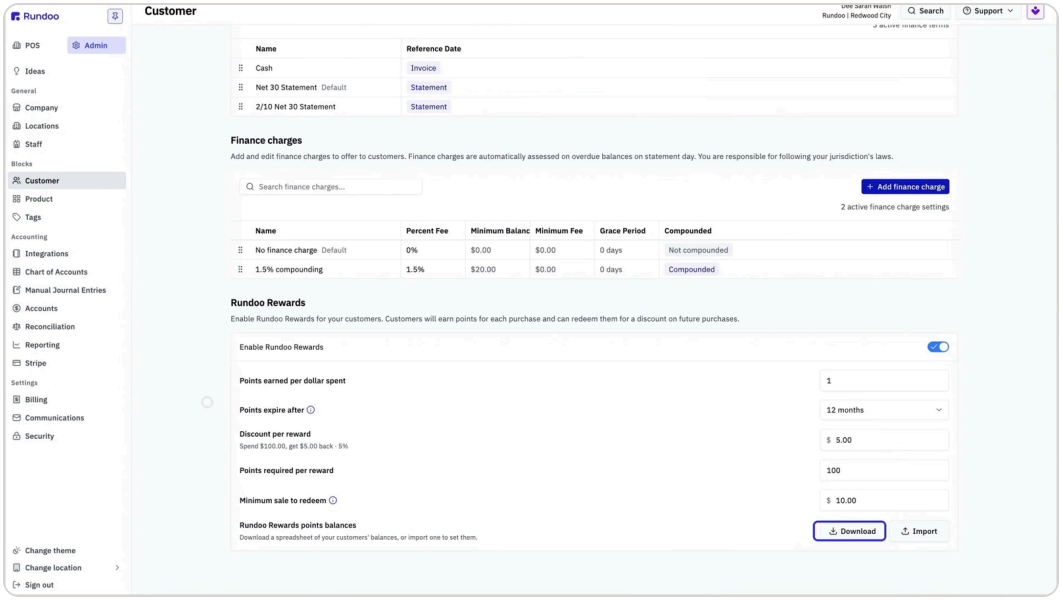
MOVE BALANCES IN BULK

Bring points over, or update a lot of customers at once

Two reasons to use this: you are switching from another loyalty program and don't want customers starting back at zero, or you want to change many balances at once (say, 100 thank-you points for everyone at Thanksgiving). Both use the same download, edit, import rhythm.

1 Download the balances file

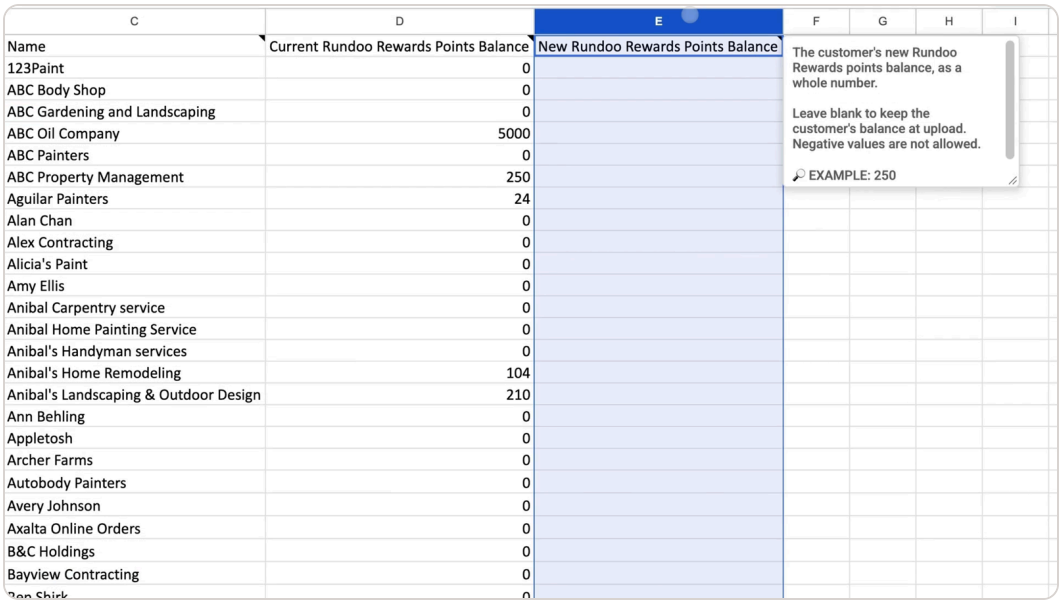
At the bottom of the same section, on the **Rundoo Rewards points balances** row, click **Download** and open the spreadsheet.



Download and Import sit on the points balances row.

2 Edit column E only

Columns A through D (the token, customer ID, name, and current balance) tell Rundoo who is who. Leave them alone. Type each customer's new balance into column E as a whole number. Leave a cell blank to keep that customer's balance as it is.

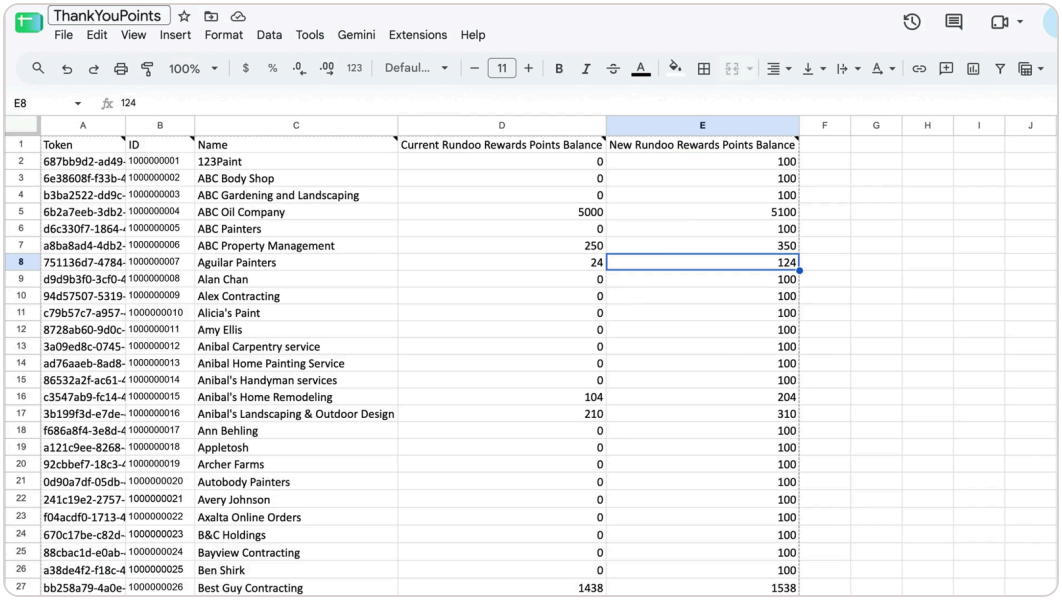


Name	Current Rundoo Rewards Points Balance	New Rundoo Rewards Points Balance
123Paint	0	
ABC Body Shop	0	
ABC Gardening and Landscaping	0	
ABC Oil Company	5000	
ABC Painters	0	
ABC Property Management	250	
Aguilar Painters	24	
Alan Chan	0	
Alex Contracting	0	
Alicia's Paint	0	
Amy Ellis	0	
Anibal Carpentry service	0	
Anibal Home Painting Service	0	
Anibal's Handyman services	0	
Anibal's Home Remodeling	104	
Anibal's Landscaping & Outdoor Design	210	
Ann Behling	0	
Appletosh	0	
Archer Farms	0	
Autobody Painters	0	
Avery Johnson	0	
Axalta Online Orders	0	
B&C Holdings	0	
Bayview Contracting	0	
Ben Shirk	0	

Column D is the current balance. Column E is the only one you edit.

3 Adding the same amount to everyone?

Use a formula in column E that adds to column D (for example, D2 plus 100) and fill it down. Then copy the column and use **Paste special**, **Values only**, so the file holds plain numbers instead of formulas. Save the file.



ThankYouPoints

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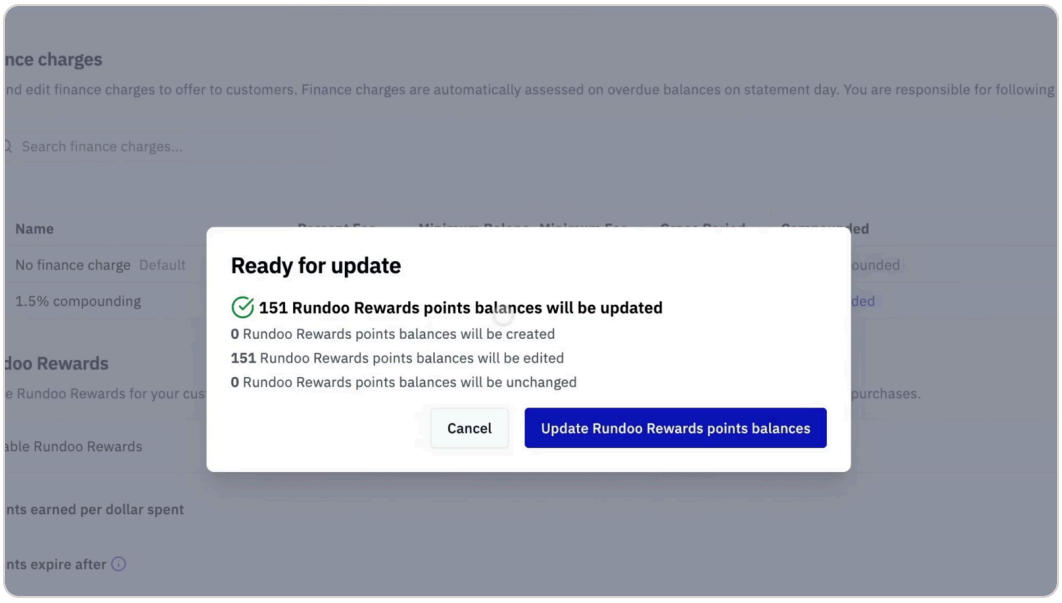
E8 124

	Token	ID	Name	Current Rundoo Rewards Points Balance	New Rundoo Rewards Points Balance
2	687bb9d2-ad49-	1000000001	123Paint	0	100
3	6e38608f-f33b-4	1000000002	ABC Body Shop	0	100
4	b3ba2522-dd9c-	1000000003	ABC Gardening and Landscaping	0	100
5	6b2a7eeb-3db2-	1000000004	ABC Oil Company	5000	5100
6	d6c330f7-1864-4	1000000005	ABC Painters	0	100
7	a8ba8ad4-4db2-	1000000006	ABC Property Management	250	350
8	751136d7-4784-	1000000007	Aguilar Painters	24	124
9	d9d9b3f0-3cf0-4	1000000008	Alan Chan	0	100
10	94d57507-5319-	1000000009	Alex Contracting	0	100
11	c79b57c7-a957-	1000000010	Alicia's Paint	0	100
12	8728ab60-9d0c-	1000000011	Amy Ellis	0	100
13	3a09ed8c-0745-	1000000012	Anibal Carpentry service	0	100
14	ad76aaeb-8ad8-	1000000013	Anibal Home Painting Service	0	100
15	86532a2f-ac61-4	1000000014	Anibal's Handyman services	0	100
16	c3547ab9-fc14-4	1000000015	Anibal's Home Remodeling	104	204
17	3b199f3d-e7de-	1000000016	Anibal's Landscaping & Outdoor Design	210	310
18	f686a8f4-3e8d-4	1000000017	Ann Behling	0	100
19	a121c9ee-8268-	1000000018	Appletosh	0	100
20	92cbbef7-18c3-4	1000000019	Archer Farms	0	100
21	0d90a7df-05db-	1000000020	Autobody Painters	0	100
22	241c19e2-2757-	1000000021	Avery Johnson	0	100
23	f04acdf0-1713-4	1000000022	Axalta Online Orders	0	100
24	670c17be-c82d-	1000000023	B&C Holdings	0	100
25	88cbac1d-e0ab-	1000000024	Bayview Contracting	0	100
26	a38de4f2-f18c-4	1000000025	Ben Shirk	0	100
27	bb258a79-4a0e-	1000000026	Best Guy Contracting	1438	1538

Everyone gets an extra 100 points, pasted as values.

4 Import it back

Back in Rundoo, click **Import** on the same row and pick your file. Rundoo shows you how many balances will be created, edited, or left unchanged. If it looks right, click **Update Rundoo Rewards points balances**.



Check the counts before you confirm.

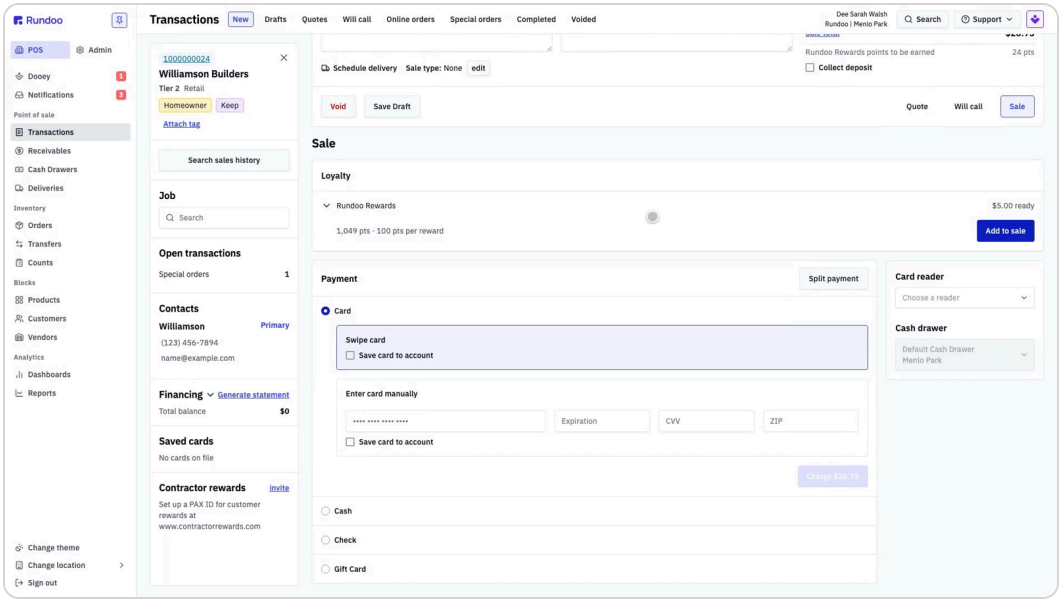
Changes can take up to 30 minutes to show. To check one, open the customer in **POS**, **Customers**, and click their **Rundoo Rewards** tab. An imported change shows in the history as Added, Granted (not Earned).

AT THE COUNTER

Earn and redeem at the register

1 Add the customer to the sale

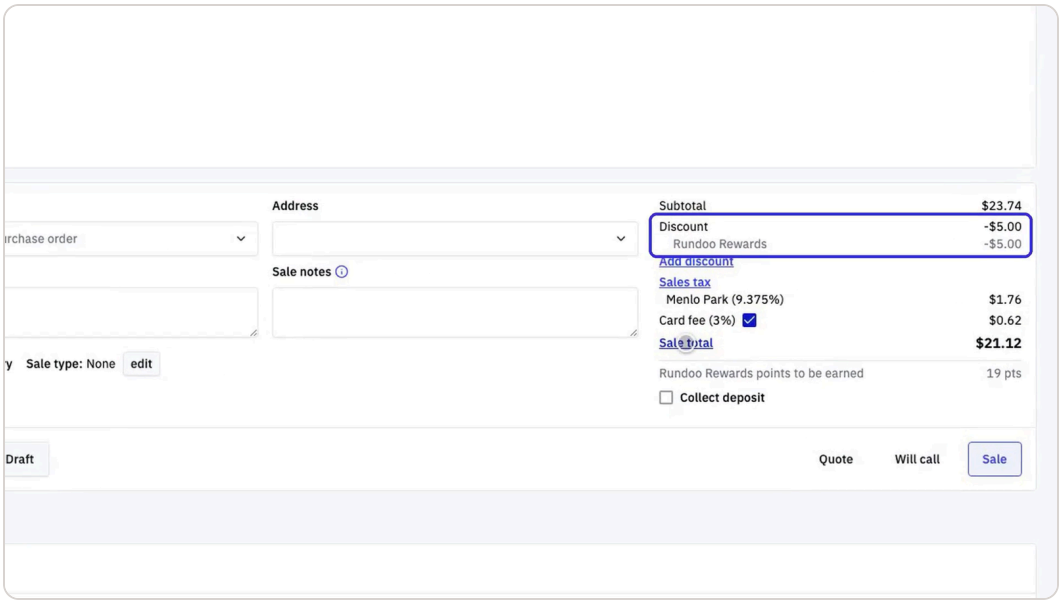
In **Transactions**, start a sale and attach the customer. Points earn on their own. If they have a reward waiting, Rundoo tells you under **Loyalty**, for example $5.00 ready, along with their point total.



A reward that's ready shows up under Loyalty on the sale.

2 Redeem in one click

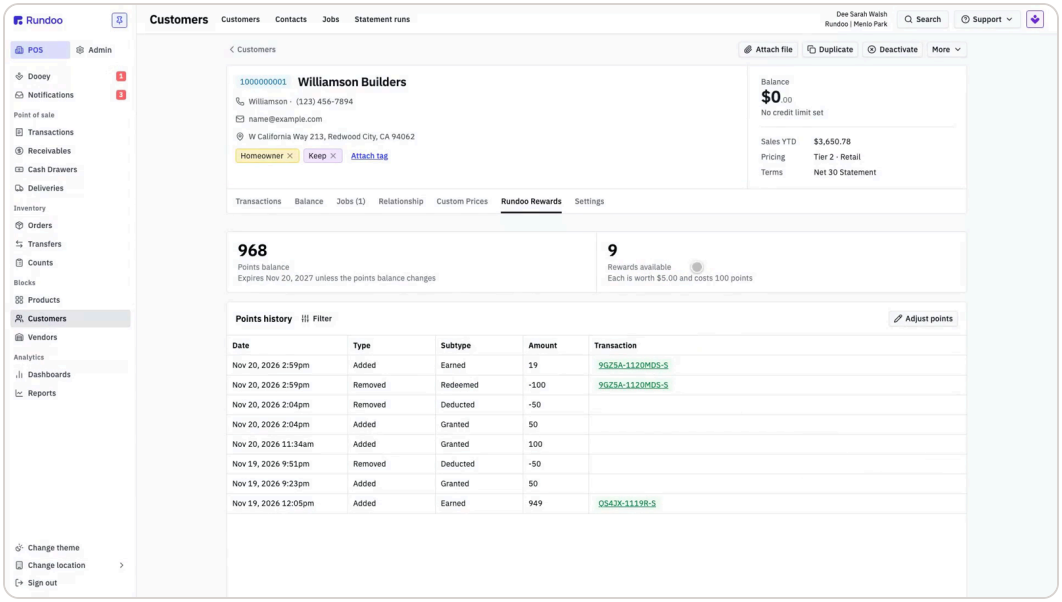
Click **Add to sale**. The reward drops onto the sale as a discount before tax, and the sale shows the points this purchase will earn.



The reward lands as a Discount line on the sale.

3 See the full picture

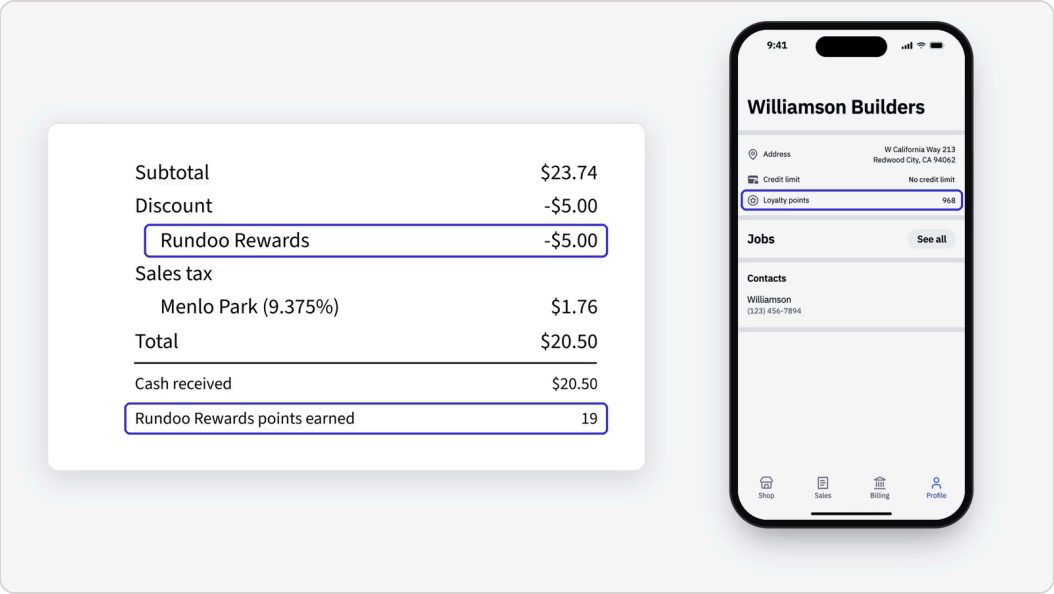
Click into the customer and open their **Rundoo Rewards** tab for their points balance, rewards available, and a history of every point earned, redeemed, granted, or deducted.



Balance, rewards available, and the full points history.

4 Your customer sees it too

Points print right on the receipt, and the balance shows in the Rundoo customer app, so they always know how close they are to the next reward.



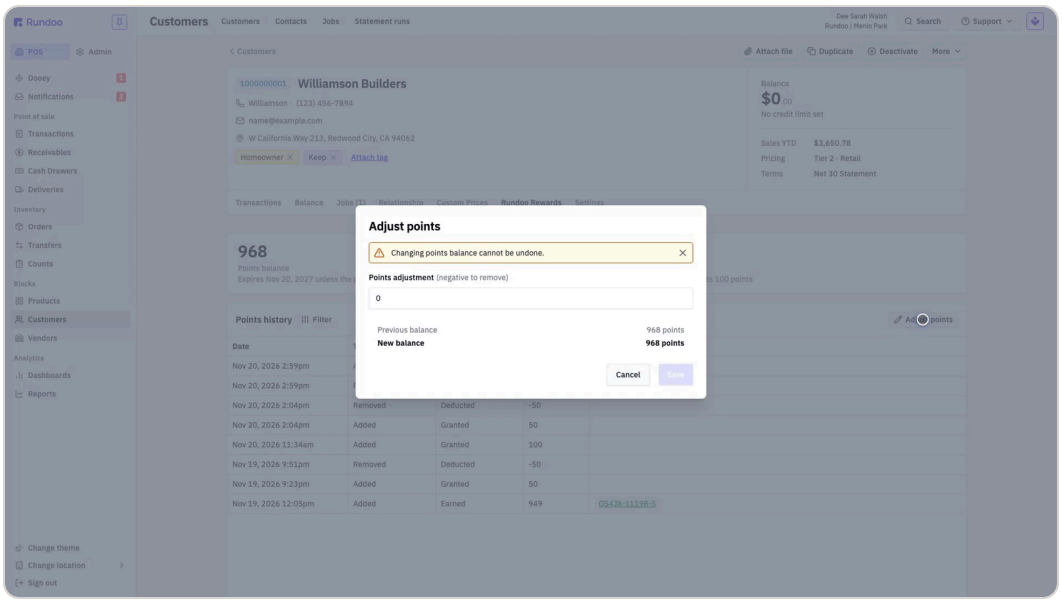
Points on the receipt and in the Rundoo customer app.

KEEP CONTROL

Adjustments, permissions, and exceptions

1 Adjust points by hand

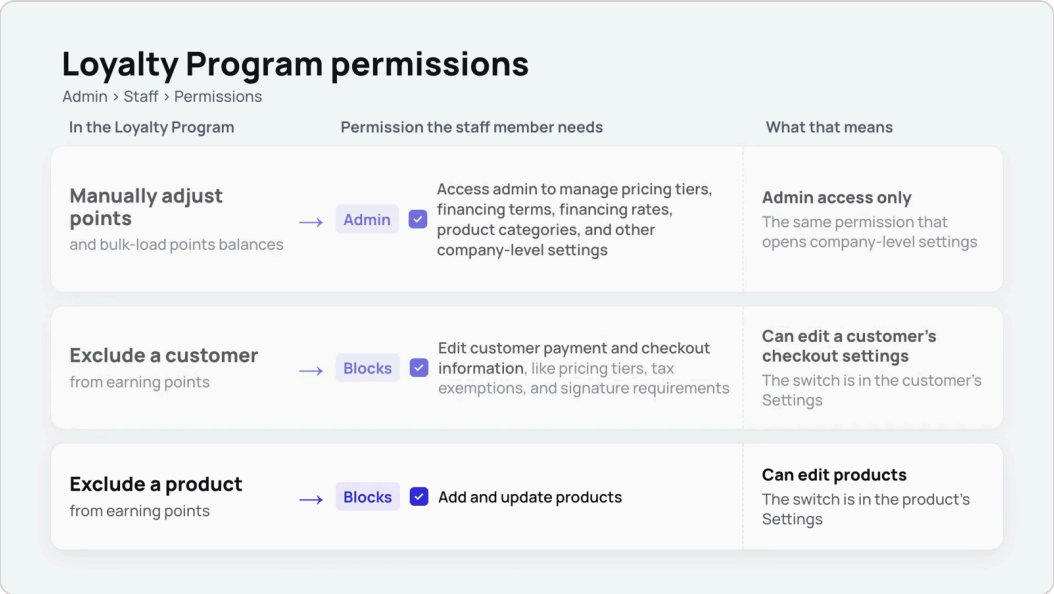
For goodwill points, a sale a clerk forgot to attach, merging two accounts, or clearing a balance: on the customer's **Rundoo Rewards** tab, click **Adjust points**, enter the change (negative to remove, positive to add), and **Save**. Rundoo shows the previous and new balance before you save.



An adjustment can't be undone, so check the new balance first.

2 Decide who can do what

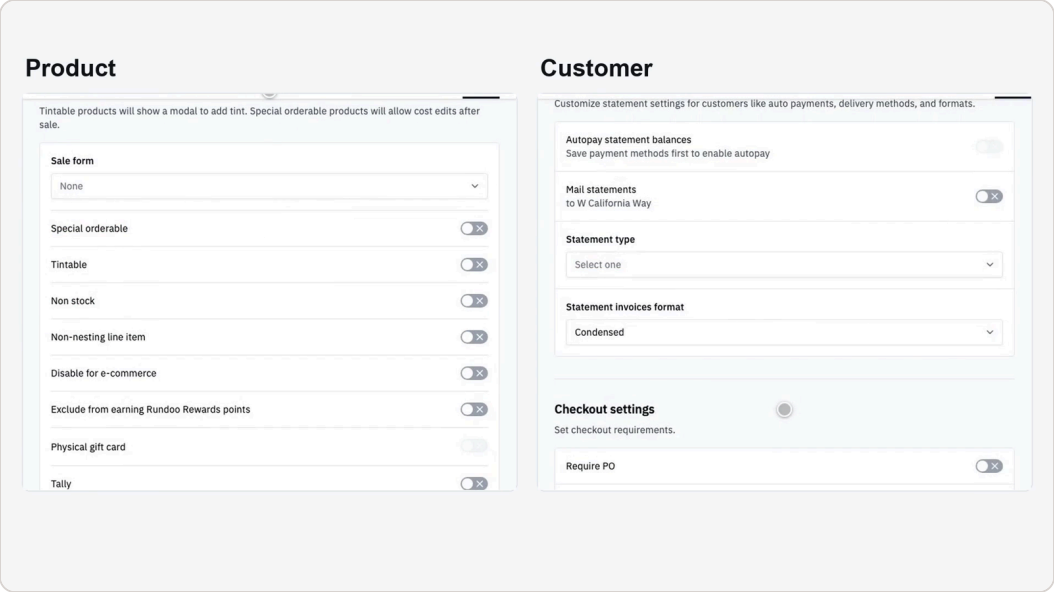
Points are real money to your store, so each action has its own permission under **Admin**, **Staff**, **Permissions**.



Three actions, three permissions.

3 Leave a product or customer out

Once the program is on, every product and every customer is in it. To make an exception, open the product's or the customer's settings, find the checkout settings, and turn on **Exclude from earning Rundoo Rewards points**.



The exclude switch lives in the product's and the customer's settings.

4

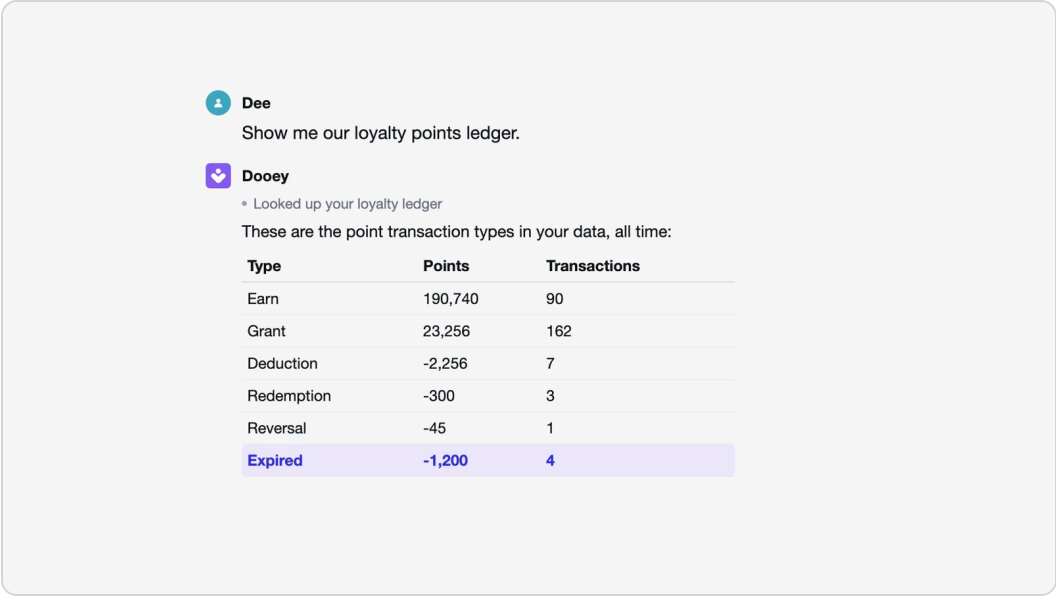
Or ask Dooey

Dooey can set exclusions for you in plain English, for example "Exclude all of Chadwicks' products from earning points" while a promotion runs. When the promotion ends, ask Dooey to remove the exclusion. Exclusions only affect future sales. Points already earned stay.

5

See your numbers

Ask Dooey for your loyalty points ledger to see what has been earned, granted, redeemed, and expired, and how many points are outstanding. No spreadsheet required. For your accountant or bookkeeper, outstanding points are tracked as a liability.



Your whole loyalty ledger is a question away.

KEEP IT HANDY

At a glance

WHERE IT LIVES

Admin, Customer

Look for the Rundoo Rewards section

STARTING RULES

1 point per $1

100 points = $5.00 off, $10.00 minimum sale. All yours to change.

POINTS EXPIRE

3 months to 2 years, or never

Counted from the customer's last purchase

BULK IMPORT

Up to 30 minutes

Edit column E only, whole numbers

Good to know

- **No reward showing at the register?** The customer has to be attached to the sale, have enough points for one reward, and the sale has to clear your minimum sale to redeem.
- **Manual adjustments can't be undone.** If you fat-finger a number, fix it with a second adjustment in the opposite direction.
- **Who can adjust points:** staff with "Access admin to manage pricing tiers, financing terms, financing rates, product categories, and other company-level settings."
- **Who can exclude:** "Edit customer payment and checkout information" for a customer, "Add and update products" for a product.
- **In the import file,** negative balances are not allowed, and a blank cell keeps the customer's current balance.