Rundoo

THE RUNDOO PRIMER · DELIVERIES

Scheduled Deliveries

> Schedule a delivery, assign the truck and driver, and track it to the job site.

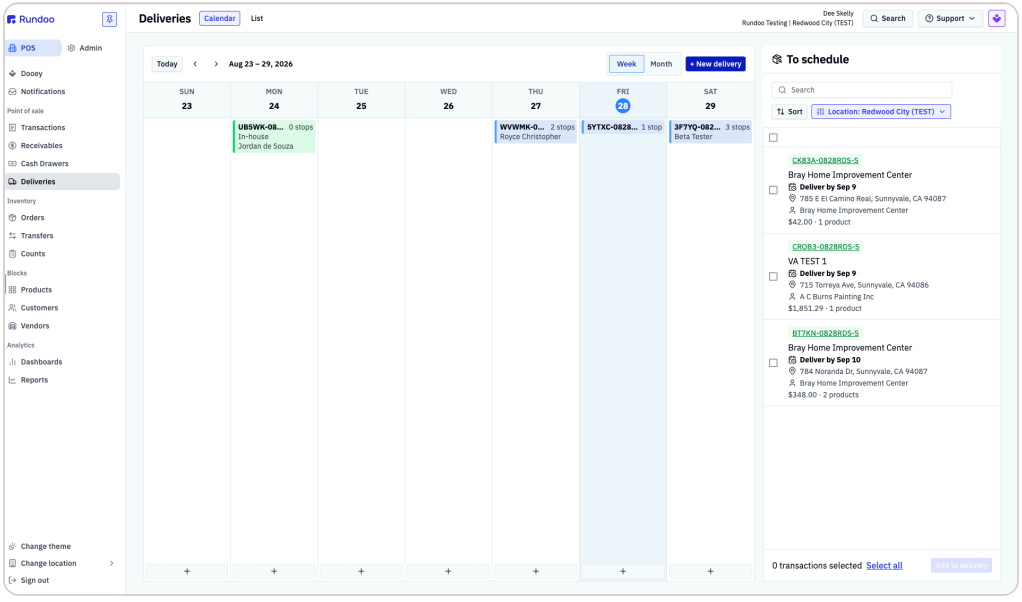
Step-by-step walkthrough 5 min read Companion to the 6:00 video

A customer rings up a big order of lumber and says they need it on site by Thursday. Instead of a clipboard or a sticky note, you can schedule the whole delivery right from your POS, build the truck run, and track it all the way to the job site. Here is how it works, start to finish.

WHERE IT LIVES

The Deliveries tab

You have a new **Deliveries** tab on the left side of the POS. Open it and you get two things: a calendar of every scheduled run, and a **To schedule** panel on the right, the to-do list of every order marked for delivery that has not been put on a run yet. Switch between **Calendar** and **List** views up top.



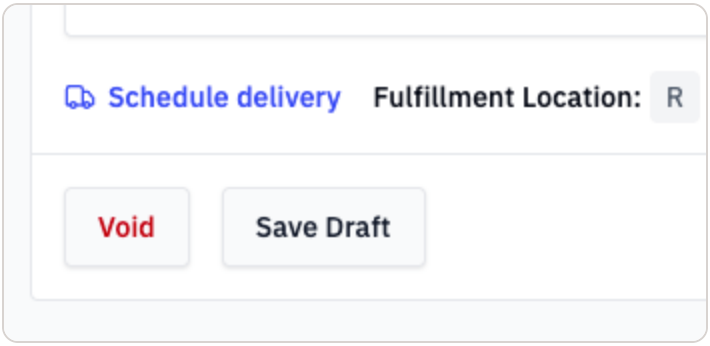
The Deliveries tab: the calendar of scheduled runs, with the To schedule queue on the right.

DO THIS

Schedule a delivery, step by step

1 At the counter, mark the sale for delivery

Ring up the sale as normal, then click **Schedule delivery**. This works on a new sale, a will call, or a completed transaction.



The new Schedule delivery button, right on the transaction.

2 Fill in the delivery details

In the box that pops up, set the **Deliver by** date (the date the customer needs it by, not the day the truck goes out), confirm the job site address, and add any special instructions. Then click **Mark for delivery** and take payment as normal. The receipt shows the delivery as pending, and your part at the counter is done.

3 The scheduler builds the run

Whoever organizes the trucks, a store manager or logistics person, opens the **Deliveries** tab. Every order waiting is in the **To schedule** panel. Select one or more orders and click **Add to delivery**.

4 Set the date, truck, and driver

Pick the actual date the run goes out. Assign a **truck** and **driver**, or leave them blank and fill them in later if you are not sure yet. Click **Schedule delivery**, and the run lands on the calendar for that day.

5

Customer calls back? Add to the same delivery

When that same customer needs one more item on the same run, start a new sale, add the item, and click **Schedule delivery** with the same deliver-by date and address. The scheduler then opens the delivery, uses **Search transactions** to find the new order, and clicks **Save** to add it as another stop.

6

Track it: In progress, then Complete

Once the truck is staged and out the door, click **In progress** so everyone can see what is left to deal with. When it is delivered, click **Complete**. Statuses only move forward, and completing a run locks it from further edits.

7

Let cashiers attach it themselves

If your cashiers handle deliveries too, they can skip the Deliveries tab entirely. Instead of **Mark for delivery**, they click **Attach to an existing delivery**, pick the run, and it is added right from the sale.

8

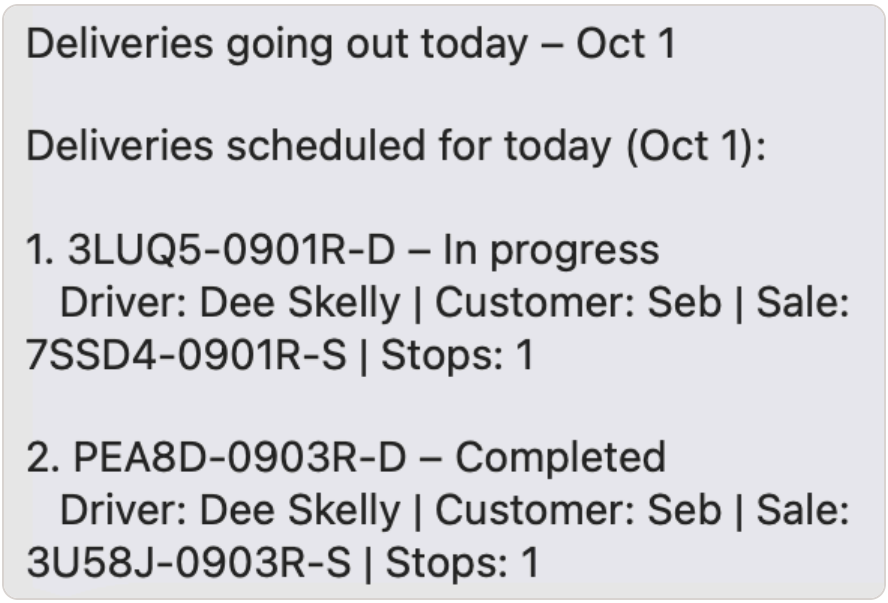
Remove or edit a stop

Need to change a scheduled delivery? As long as it is not marked completed, open the run, find the transaction, and click the **X** to remove it, or click **Edit** to change the address or contact details.

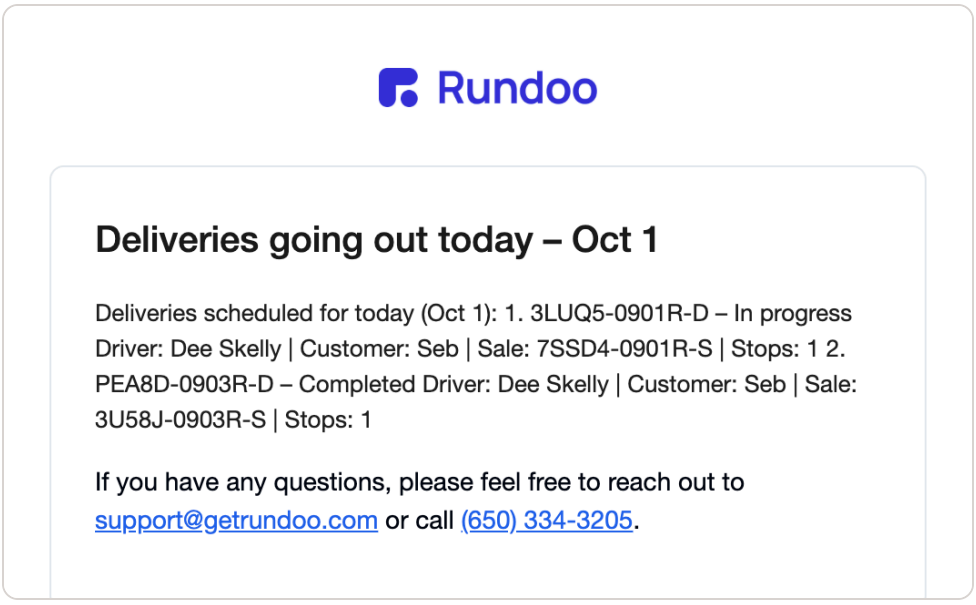
GO FURTHER

Set up a routine to notify your staff each day

Rundoo does not have a built-in deliveries-due alert, but you can build one in a couple of minutes with a **Dooey routine**. On a staff account that can run reports, ask Dooey to set up a daily routine that texts or emails whoever runs deliveries a rundown of the day: what is scheduled to go out, plus anything sold for delivery that is not on a run yet and is coming due. You pick text, email, or both, and you word it however you like.



As a text message: the day's scheduled runs, each with its driver, customer, sale, and stop count.



As an email: the same daily rundown, delivered to whoever manages the trucks.

KEEP IT HANDY

At a glance

DELIVER BY DATE

When they need it

Not the truck day, the arrive-by date. Gives the scheduler room to plan.

TO SCHEDULE PANEL

The to-do list

Every order marked for delivery that is not yet on a run.

STATUSES

Scheduled → In progress → Completed

Forward only. In progress is optional. Completed locks the run.

DRIVERS

Staff members

Add them under Admin → Staff. No counter access needed, just a name to assign.

Good to know

- Truck and driver are optional at scheduling time, so you can lock in the day now and assign the driver the morning it goes out.
- Multiple orders can ride on one delivery. Multi-select in the To schedule panel and Add to delivery to batch them onto a single run.
- Delivery status is separate from the sale's status, so a paid, completed sale can still be a delivery that is scheduled or in progress.
- Want a daily reminder of what needs to go out? Set up a Dooey routine to text or email it to whoever runs deliveries. See **Set up a routine to notify your staff each day**, above.