GETTING STARTED WITH RUNDOO · SETUP

Monthly Statement Runs

Rundoo builds every charge-account statement overnight on your statement day. When you sit down, all that's left is to review and send.

THE TWO DELIVERY TRACKS

1

Email

Goes to every contact with an email on file.

Click Send statements

2

Mail

One PDF packet to print, stuff, and mail.

Click Download statements

3

Finish

Marks the run done and logs it in history.

Click Complete

Run it in 5 steps

1. Open **Customers → Statement runs** in POS.
2. Spot the ready-to-send banner, click **View details**.
3. Click **Preview** and scroll the batch.
4. Click **Send statements**, then **Download statements**.
5. Print and mail the paper copies, then click **Complete**.

When it's ready

Overnight, on your statement day

Set in **Admin → Communications**, defaults to the 20th. The banner on Statement runs is your cue.

The one to remember: the run generates on its own, but it does not send on its own. Nothing reaches a customer until you press send.

No email on file? A customer with no contact email is skipped from the email count. Send them a downloaded copy instead.