Rundoo

GETTING STARTED WITH RUNDOO · SETUP

Monthly Statement Runs

> Your monthly statements generate overnight, so all you do is review and send.

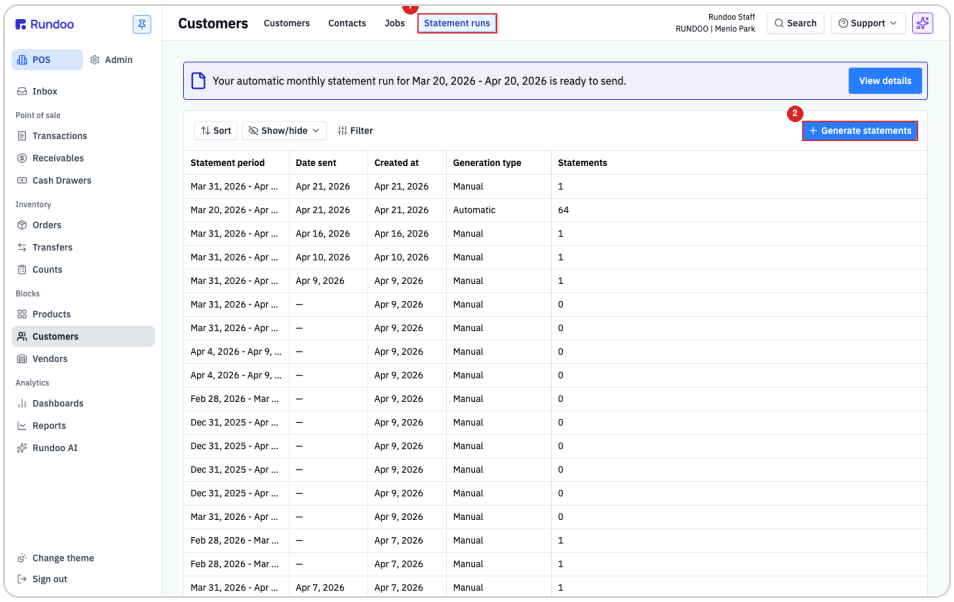
Step-by-step walkthrough ~3 min read Companion to the 3:17 video

Once a month, every charge-account customer needs their statement. The good news is that Rundoo already did the heavy lifting. On your statement day, it builds the whole batch overnight, applies any finance charges, and lines it all up. When you sit down, the month's statements are ready and waiting. All that's left is to give them a look and get them out the door, and that takes a few clicks.

WHERE IT LIVES

The Statement runs tab

In **POS** mode, click **Customers** in the left navigation, then the **Statement runs** tab at the top. This is home base for every statement run, past and present. When your monthly run is ready, a banner sits right at the top of this page.



The Statement runs tab. The banner at the top is your cue that this month's run is ready to review.

DO THIS

Send the whole month, step by step

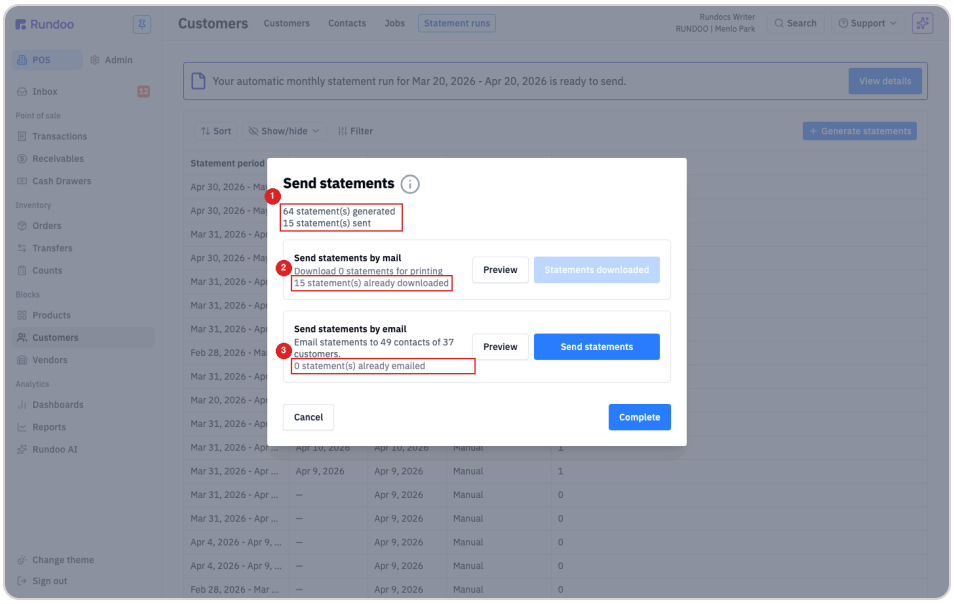
1 Spot the ready-to-send banner

On the **Statement runs** tab, look for the highlighted banner telling you this month's automatic run is ready to send. That banner is your signal that Rundoo built the batch overnight and it's waiting on you. Click **View details** on the banner to open the run.

The one thing to remember: the run generates on its own, but it does not send on its own. Nothing reaches a customer until you press send. So seeing the banner is step one, not the finish line.

2 Give the batch a quick look

The banner opens the **Send statements** window, split into two tracks: **Send statements by mail** and **Send statements by email**. Rundoo sorts each customer into the right track based on how they've asked to be billed. Before you send anything, click **Preview** on either track. It opens one PDF with every statement in the run, so you can scroll through and make sure the numbers look right. Worth doing every time, especially your first few months.



The Send statements window: mail on one side, email on the other, each with its own Preview and send button.

3 Send the emailed ones in a click

In the email track, click **Send statements**. Rundoo emails each customer's statement to the contacts on file, and the counter updates to show how many went out. Customers can have more than one contact, and each one gets a copy.

4 Download the paper copies to print and mail

For the customers who get paper, head to the mail track and click **Download statements**. That saves one file to your computer with every mailed statement in it, ready to print, stuff, and drop in the mail. The helper text tells you how many copies are in the packet.

5 Click Complete when the month is out the door

Once the emails have gone and the paper copies are printed and in their envelopes, click **Complete** at the bottom of the window. That marks the whole run as done and closes out the month. The finished run then shows up in the history table on the **Statement runs** tab, so you always have a record of what went out and when.

KEEP IT HANDY

The monthly run at a glance

WHERE **Customers → Statement runs** In POS mode, left navigation.	WHEN **Overnight, on your statement day** Set in Admin → Communications. Defaults to the 20th.
TWO TRACKS **Email and mail** Rundoo sorts each customer by their billing preference.	FINISH **Click Complete** Marks the run done and logs it in the history.

Good to know

- Emailed statements go to every contact with an email on file. A customer with no contact email is skipped from the email count, so send them a downloaded copy instead.
- You don't have to do both tracks at once. Email some customers now, download and mail the rest later, and the counters tell you what's still outstanding.
- Practicing in your practice store? Run it as many times as you like. Nothing there touches your real books or reaches a real customer.