GETTING STARTED WITH RUNDOO · SETUP

A Customer's Settings Tab

Tune a customer's Settings tab (POS → Customers → the account → Settings) and every sale rings right after that.

THE FOUR SECTIONS THAT DO THE WORK

1

Contacts

Who gets which paperwork.

Add new contact + delivery prefs

2

Payment & pricing

Faster checkout, right prices.

Card / ACH + Pricing tier

3

Checkout settings

Blocks the sale until it's filled.

Require PO, Job, Buyer, Signature

Do it in 4 steps

1. Open **POS → Customers**, click the account, open the **Settings** tab.
2. Edit a section (Contacts, Pricing tier, Notes, Checkout, Tax), then click its own **Save**.
3. For checkout rules, toggle on **Require PO** and any others the account needs.
4. Repeat per section. Each one saves on its own.

Make them tax-exempt

Use custom tax rate

Pick a **0.0%** rate. The Sales tax number field is **records only**, it does not remove tax.

No 0.0% rate in the list? Create it once in **Admin → Locations → Custom tax rates**, then come back and pin the customer to it.

Sale reminder: a note in the Notes section pops up on the transaction screen every time this customer is added to a sale. It flags the cashier without blocking the sale.