Rundoo

GETTING STARTED WITH RUNDOO · SETUP

A Customer's Settings Tab

> Tune a customer's contacts, checkout rules, and tax so every sale rings right.

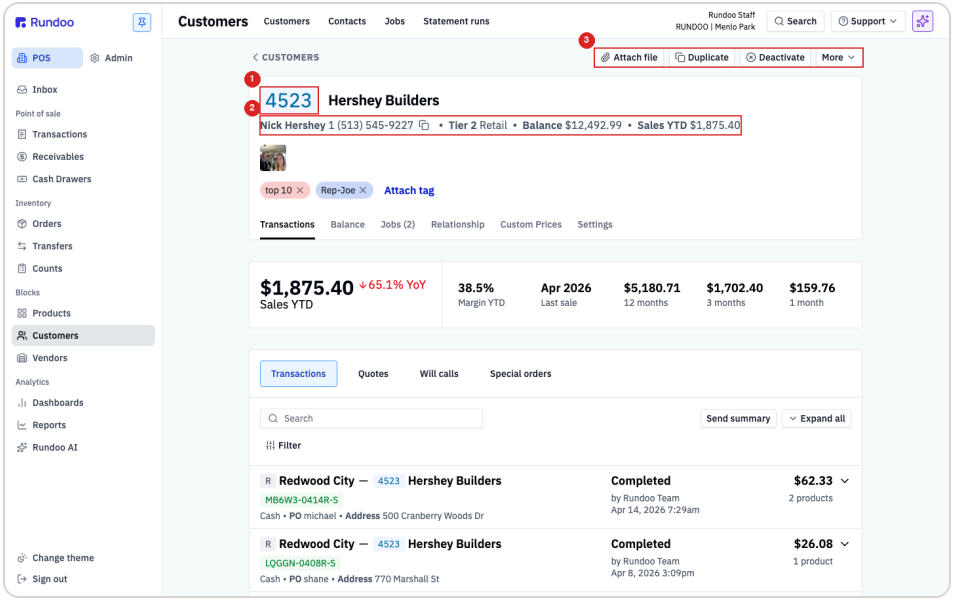
Step-by-step walkthrough ~4 min read Companion to the 3:43 video

Every store has those key accounts with their own set of rules. Maybe a contractor needs their invoices sent straight to accounting, always requires a purchase order at the counter, and rings up tax-exempt. In Rundoo you set all of that up one time, on the customer's Settings tab, and it stays right every single time they come in. No sticky note on the register, no reminding the new cashier.

WHERE IT LIVES

The customer's Settings tab

Open **POS** and click **Customers** in the left menu. Find the account you need and click their name to open their detail page. Across the middle you'll see a row of tabs: Transactions, Balance, Jobs, Relationship, Custom Prices, and **Settings**. Everything in this guide lives on that **Settings** tab.



The customer detail page. The Settings tab sits at the right end of the tab row, next to Custom Prices.

One habit to build before you touch anything: each section on the Settings tab has its own **Cancel** and **Save** buttons. Saving one section does not commit changes anywhere else on the page. So edit one

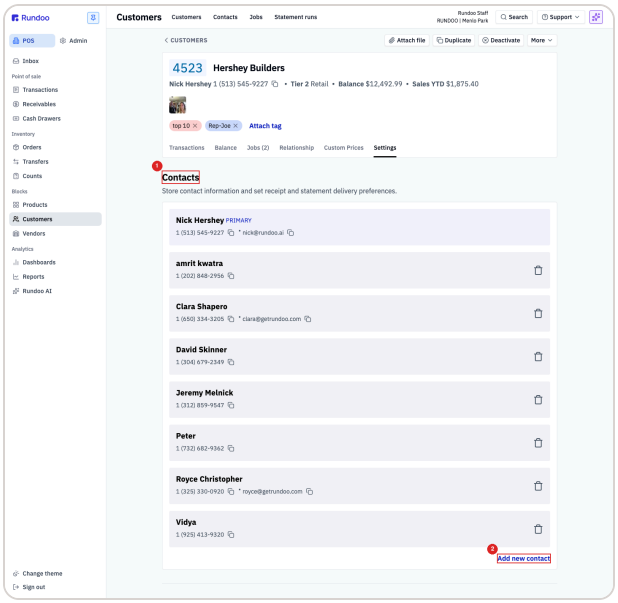
part, save it, then move on to the next.

DO THIS

Set the customer up, section by section

1 Add the right contacts and their delivery preferences

Scroll to **Contacts**. This is where you decide who gets what paperwork. The business is the customer, and the people who buy or handle the books under it are the contacts. Click **Add new contact** to add the accounting person, then set their receipt and statement delivery preferences. Turn on email statements for the person who handles the books, and the crew lead can still get the day-to-day receipts. Click **Save** in the Contacts section when you're done.



The Contacts section on the Settings tab. Add new contact is at the bottom right of the list.

2 Keep a payment method on file and set the pricing tier

Below Contacts, the **Cards** and **Bank account** sections let you store a card or ACH details for faster checkouts. Then in **Pricing tier**, put the account on the tier that gives them the right prices (for a contractor, that is usually a tier above plain retail). Save whichever section you changed.

3 Add a sale reminder for the counter

In the **Notes** section there's a **Sale reminders** field. Whatever you type there pops up right on the transaction screen every time this customer is added to a sale. It's the place for a note like "confirm PO with accounting before charging on account." It does not block the sale, it just flags the cashier. Type your reminder and click **Save**.

4 Lock in the checkout rules

Scroll to **Checkout settings**. These toggles block the cart from completing until the matching field is filled. For a contractor whose accounting team needs a PO on every invoice, turn on **Require PO**. Once it's on, Rundoo turns that field red at the counter and won't let the cashier finish the sale until a PO number is entered. Other options here include **Require job**, **Require buyer**, and **Require receipt signature**. Flip the ones this account needs and click **Save**.

5 Make them tax-exempt the right way

Scroll to **Tax exemptions**. Here's the detail that trips people up: typing a number into the **Exempt: Sales tax number** field is for record-keeping only. It prints on invoices where required, but it does not change how tax calculates on the cart. To actually remove the tax, turn on **Use custom tax rate** and pick your store's zero-percent rate (for example, a rate named "Tax exempt" set to 0.0%) from the dropdown. Click **Save**, and from then on every sale for this customer rings up tax-free.

Before you can pick a zero-percent rate

If you don't see a "Tax exempt" rate in that dropdown yet, it hasn't been created. Custom tax rates are defined once in **Admin → Locations → Custom tax rates**. Add a 0.0% rate there first, then come back to the customer's Tax exemptions section and pin them to it.

KEEP IT HANDY

The Settings tab at a glance

CONTACTS **Who gets what paperwork** Per-contact receipt and statement delivery.	PAYMENT & PRICING **Card / ACH on file, Pricing tier** Faster checkout and the right prices.
CHECKOUT SETTINGS **Require PO, Job, Buyer, Signature** Blocks the sale until the field is filled.	TAX EXEMPTIONS **Use custom tax rate** The 0.0% rate is what actually exempts.

Good to know

- Every section saves on its own. Edit one, save it, then move to the next, so a change in Contacts never waits on a change in Tax exemptions.
- A required toggle turns the matching field red at the register and blocks Complete sale until it's filled. These rules follow the customer to every register, not just the one where you set them.
- The Sales tax number field is records only. The exemption happens through Use custom tax rate.
- This is a great time to explore. Open a customer in your practice store and click around, none of it touches your real data.