

GETTING STARTED WITH RUNDOD · SETUP

Set It Once

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.