GETTING STARTED WITH RUNDOO · SETUP

Set Up a Supplier

> Add a vendor and set where your orders get sent.

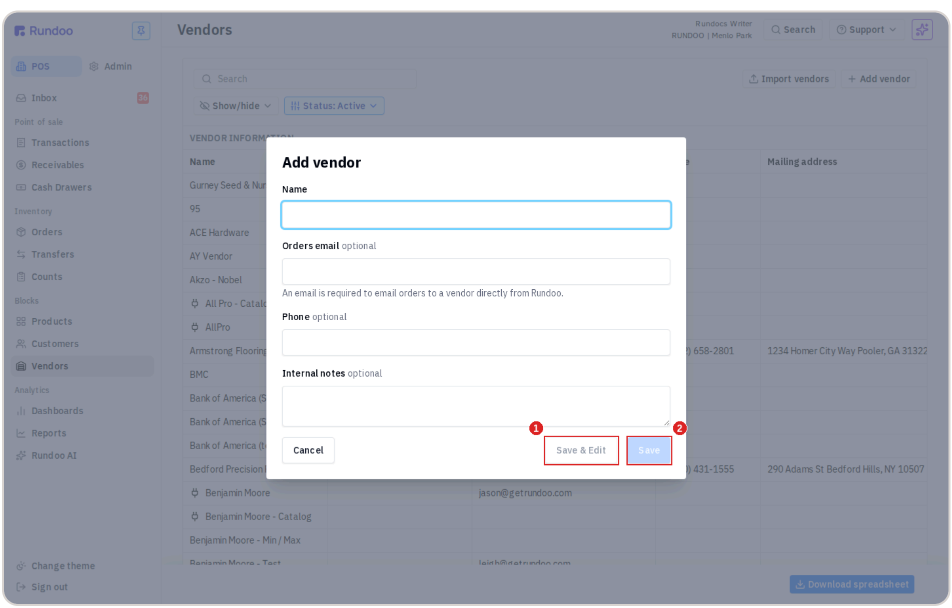
Step-by-step walkthrough   ~3 min read   Companion to the 2:26 video

You're bringing on a new line of products, or just getting a new supplier set up. Before you can place that first purchase order, Rundoo needs to know who they are. The good news is that getting a vendor in the door takes about a minute. All Rundoo asks for is a name. Two more fields are worth getting right the first time, and this guide walks you through both so you're ready to order.

WHERE IT LIVES

Find Vendors and start a new one

In POS mode, open **Vendors** in the left sidebar. Just like adding a customer or a product, the button to create a new one is up in the top-right corner. Click **Add vendor** and a small modal opens with the handful of fields Rundoo needs to create the record.



The Add vendor modal. Only Name is required. Save & Edit (1) opens the full profile; Save (2) drops you back on the list.

DO THIS

Adding a vendor, step by step

1

Type the name

You can fill out everything right here, but the only thing Rundoo requires is the **Name**. This is the name that shows on purchase orders, invoices, and in your list, so spell it the way you want to see it. It has to be unique. If a vendor by that name already exists, Rundoo shows a red banner and keeps the modal open so you can rename.

2

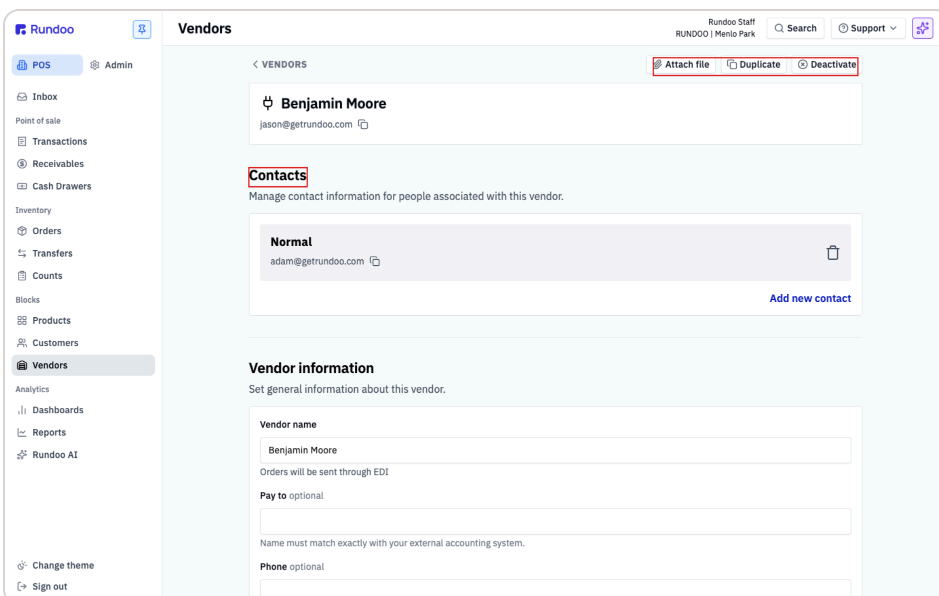
Save, or Save & Edit to keep going

You've got two ways to finish. **Save** creates the vendor and takes you back to your list, which is all you need when you just want them in the system. **Save & Edit** creates the vendor and drops you straight onto their full profile so you can set the address, ordering email, and contacts. For a brand-new supplier you'll actually order from, pick Save & Edit.

3

Set the Pay to name

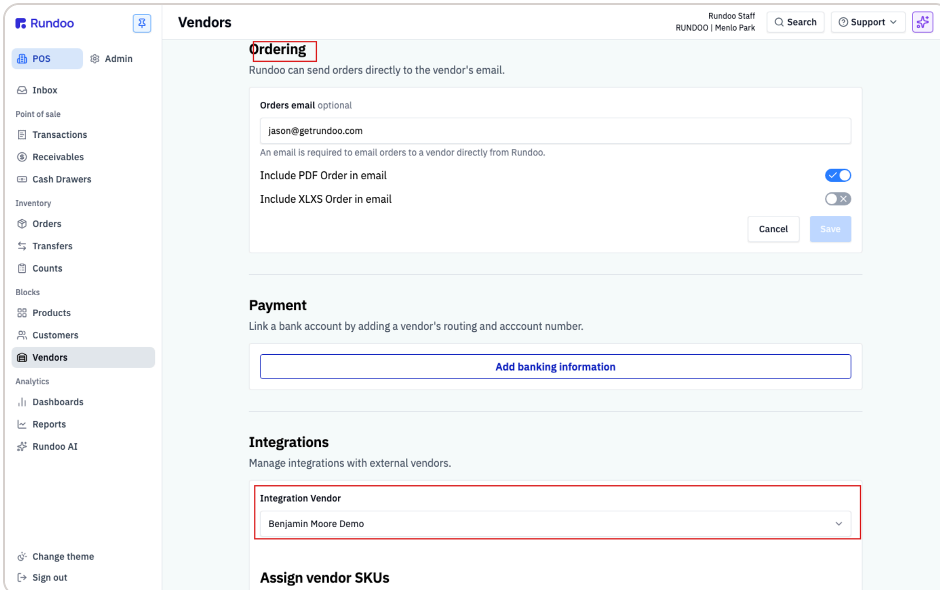
On the detail page, scroll to **Vendor information**. The field to get right here is **Pay to**. If you connect Rundoo to your accounting system, like QuickBooks, this name has to match what's in your books exactly. It's the official name that goes on the check. Type it the way your books have it, then use the section's own **Save** at the bottom.



The detail page stacks its sections. Vendor information holds the Pay to field, which must match your accounting system exactly.

4 Point the Orders email where POs should go

Scroll to **Ordering**. The **Orders email** is where Rundoo sends your purchase orders. This is usually a main inbox for the company, not your personal rep's address. It's a single email, so no CC or comma-separated list. If you need a PO copied to a second person, use a distribution list or an inbox rule on that account. You can also choose whether to attach the PO as a PDF, an Excel file, or both, with the two toggles right below.



The Ordering section: set the Orders email, then flip the attachment toggles for how the PO goes out.

5 Keep your rep as a Contact

Want your rep's direct line handy? Scroll up to **Contacts** and click **Add new contact**. The company is the vendor; the people you work with (your rep, the shipping manager, accounts receivable) are contacts underneath. Just remember contacts are for reference only. Rundoo sends the actual PO to that main Orders email, never to individual contacts.

KEEP IT HANDY

The two fields worth getting right

ONLY REQUIRED FIELD **Name** Shows on POs and invoices. Must be unique.	PAY TO **Match your books** Has to match your accounting system exactly.
ORDERS EMAIL **One address** Where POs get sent. No CC or comma list.	SAVE & EDIT **Opens the profile** Use it when you'll add details now.

Good to know

- Each section on the detail page saves on its own. A green "Vendor saved" banner flashes at the bottom for about two seconds. If you didn't see it, scroll back and check the field committed.
- An invalid Orders email blocks the save and shows the error inline. Clear it or fix it, then save again.
- Attaching your rep as a Contact does not put them on the PO. Orders always go to the vendor's Orders email.
- Moving a whole vendor list over from your old system? Use Import vendors instead of adding them one at a time.