Rundoo

GETTING STARTED WITH RUNDOO · VALIDATE YOUR DATA

# Straight to the Vendor

> Check each supplier's order email and account numbers so your POs land right.

Step-by-step walkthrough    ~3 min read    Companion to the 4:14 video

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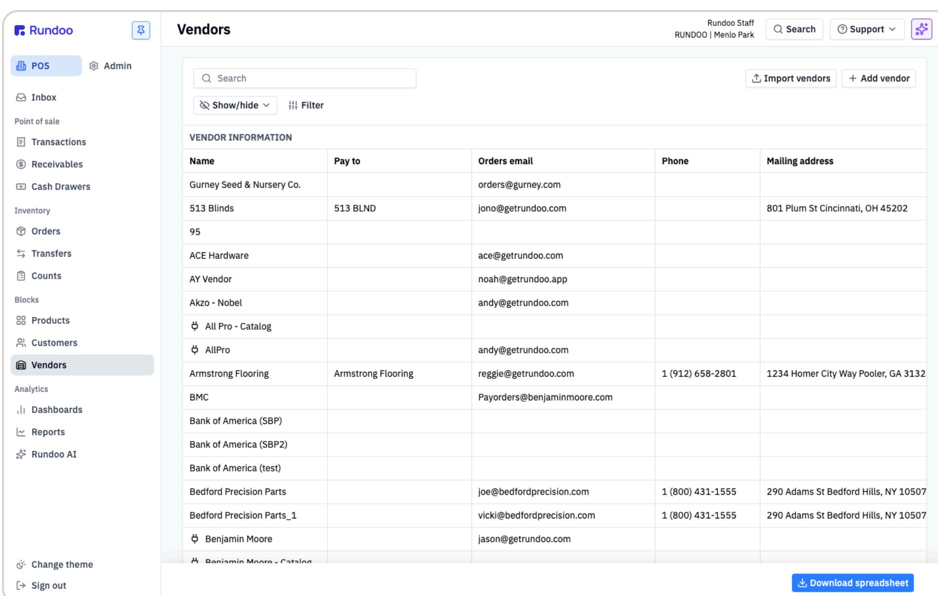
Your first purchase order in Rundoo should land in the right inbox the first time, not sit unread in a rep's personal email or bounce because a co-op never got your account number. This is a quick, before-you-go-live spot-check of your main suppliers. You are not fixing anything here. You are eyeballing a few key fields, and flagging anything that looks off so your Rundoo guide can square it away before you place a real order.

WHERE IT LIVES

## Your vendor list

In **POS** mode, click **Vendors** in the left sidebar. This is the list of every supplier you buy from. You do not need to open all of them. Pick the handful you order from every week, your paint line, your main co-op or distributor, and check those.



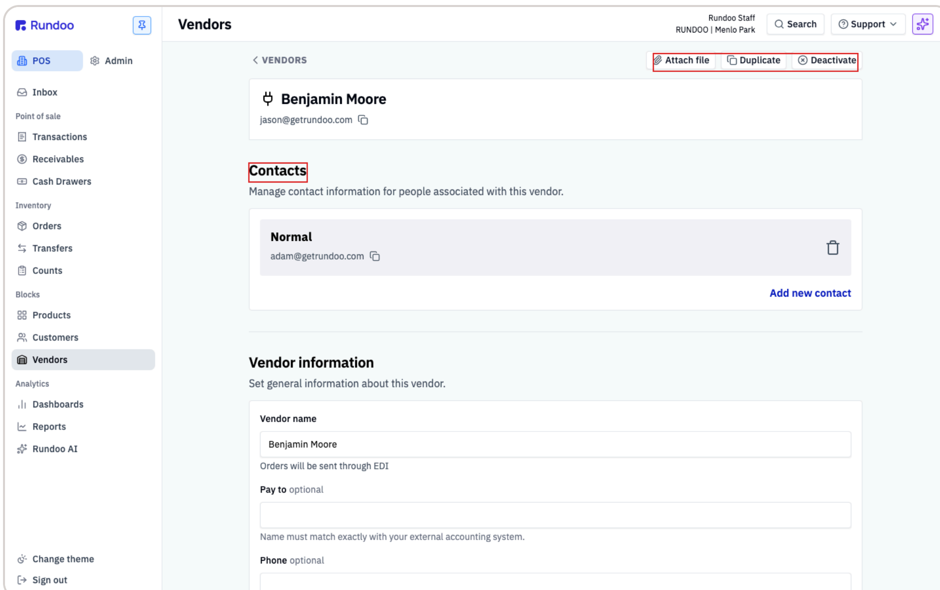

The Vendors tab in POS. Start with the few suppliers you order from most.

DO THIS

# Spot-check a vendor, field by field

## 1 Open a main supplier's record

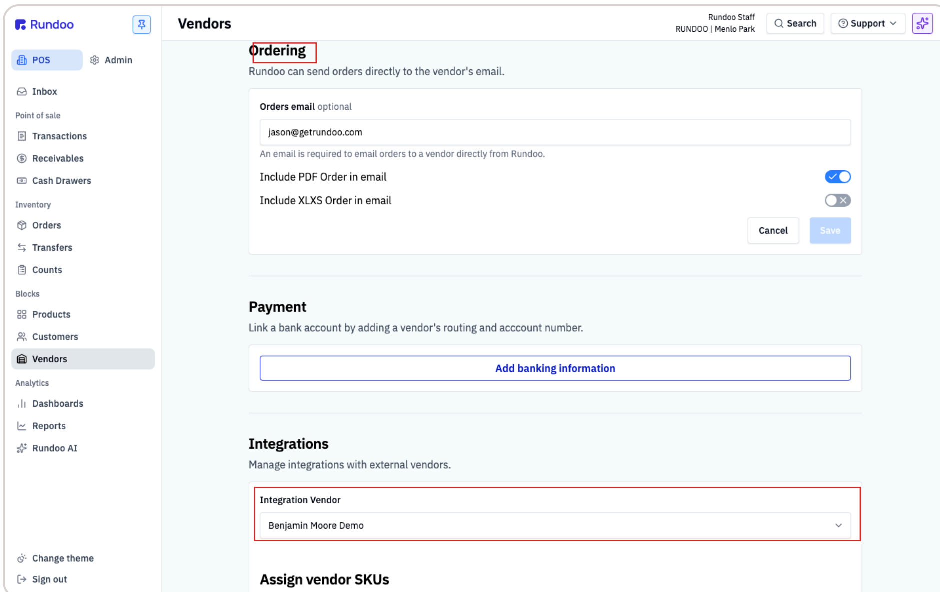
Click the vendor's row to open their detail page. The header shows the vendor name and their orders email, with an action cluster top-right. Below it the page stacks a few sections that each save on their own, the ones you care about today are `Ordering`, `Vendor information`, and `Vendor settings`.




A vendor's detail page. Each section saves on its own, so you can scroll and read without changing anything.

## 2 Confirm the orders email

Scroll to the **Ordering** section and look at the **Orders email**. This is the single address Rundoo sends your purchase order to when you submit an order. Make sure it is the vendor's actual order desk, not your sales rep's personal email. That mix-up is common, and it leaves an order sitting in the wrong inbox with nobody working it.




The Ordering section. The Orders email is one address, so it needs to be the order desk.

## 3 Check whether it's a connected supplier

Next, see if this is a supplier you order from electronically, a co-op or major distributor like Do it Best or Orgill. The tell is a line reading **Orders will be sent through EDI** under **Vendor information**, plus a small plug icon up in the header. If you see it, this vendor's orders go out over a live connection, which is why the next step matters.

## 4 Verify the account numbers for each location

For a connected supplier, scroll to **Vendor settings**. That is where your account number lives, one for each of your locations, because that is how the supplier knows which store an order is for. Make sure every location has its number filled in. If one is missing, your electronic orders to that store may not go through.

You may notice the per-location **Edit** button is greyed out on a connected vendor. That is on purpose. Rundoo maintains those account numbers so the connection can't break, so you won't be able to change them yourself, and you don't need to.

### 5 Flag anything off for your Rundoo guide

Found a wrong orders email or a missing account number? Do not fix it yourself, and do not send a test purchase order to check the connection. A test PO can trigger a real shipment. Instead, use the **Ask a question** box right under this video. Type exactly what's wrong, the vendor name and the issue, and send it. It goes straight to your Rundoo guide to fix before you go live. You flag it, we take care of the rest.

KEEP IT HANDY

## The three fields to check

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|---|---|
| ORDERS EMAIL<br>**Under Ordering**<br>One address. The vendor's order desk, not a rep. | CONNECTED?<br>**Under Vendor information**<br>Look for "Orders will be sent through EDI." |
| ACCOUNT NUMBERS<br>**Under Vendor settings**<br>One per location for connected suppliers. | SOMETHING OFF?<br>**Ask a question box**<br>Flag it. Never send a test PO. |

**Good to know**

- A blank field isn't always a mistake. For connected co-ops, account numbers often get filled in right before you go live. Flag it and let your guide confirm whether it's still coming or needs fixing.
- A greyed-out Edit button on a connected vendor means Rundoo manages that account number. Don't try to work around a locked field.
- The orders email accepts a single address only. If a PO needs to reach a second person, use a distribution list or an inbox rule on the vendor's side, and tell your guide.