GETTING STARTED WITH RUNDOO · SETUP

Relationships & Custom Prices

Assign a rep, keep notes, and set a customer's own price. It all lives on the Relationship tab and rings automatically at the counter.

THREE THINGS YOU DO ON THE PROFILE

1

Assign a rep

Give the account one owner. Powers sales-by-rep reports.

Relationship → edit

2

Log a note

Visits, calls, texts. Stamped with date and author for the whole team.

New interaction → Save

3

Set a price

A standing deal on the products they buy most.

Products → Custom prices

Add a custom price in 4 steps

1. **Products → Custom prices → + Add custom price**.
2. **Assign to** the customer, then **By product** and add the item.
3. Pick a **Pricing strategy**: Dollar, Discount off a tier, or Margin.
4. Set the schedule and location, then **Save**.

At the counter

Rings on its own

The custom price shows with the **tier price crossed out** and the savings called out. No cashier input needed.

Stacks on tiers: only the products you cover ring at the special price. Everything else still rings at the customer's tier, so you never have to rebuild the whole list.

Not a floor: a custom price is a starting price. Changes apply on the next sale, not past ones, and a cashier can still Edit price unless you lock it with Support.