Rundoo

GETTING STARTED WITH RUNDOO · SETUP

The VIP Treatment

> Assign a rep, keep notes, and set a customer’s own price.

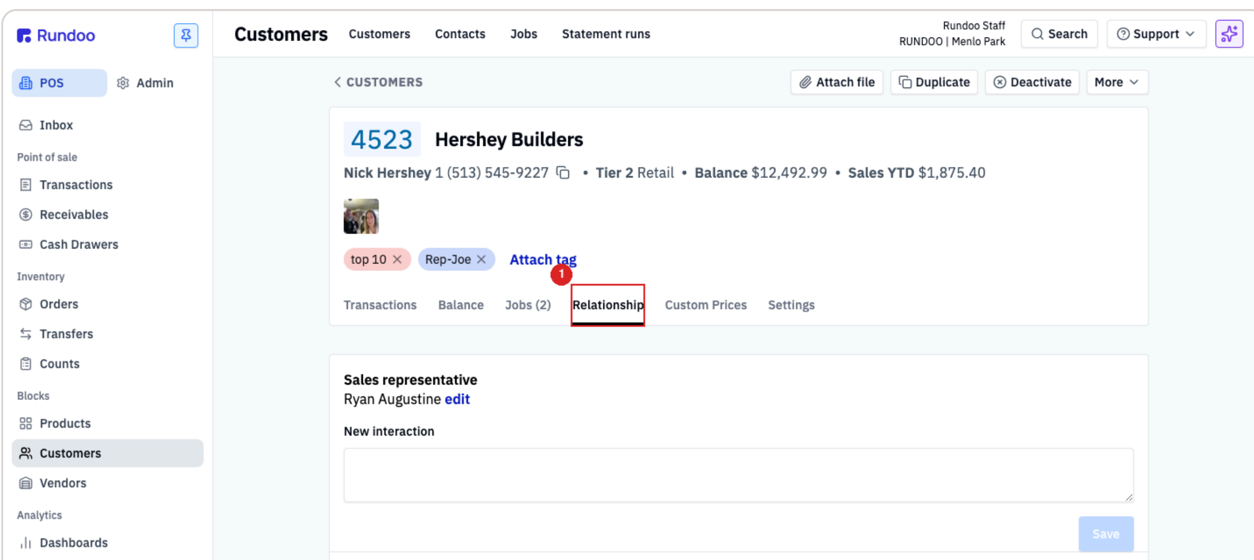
Step-by-step walkthrough ~3 min read Companion to the 3:06 video

You've got those key accounts, your best contractors and your biggest buyers, who you want to take special care of. That’s about a relationship, not just ringing up a sale. Rundoo keeps all of it on the customer’s own profile: who owns the account, the notes your team leaves along the way, and the special price they've earned. Set it once and it takes care of itself at the counter.

WHERE IT ALL LIVES

The Relationship tab

Open **POS**, click **Customers** in the left sidebar, pull up the account, and click the **Relationship** tab on their profile. This one tab holds two things: who the account’s **Sales representative** is, and a running log of every interaction your team has had with them.



The Relationship tab on a customer’s profile: the assigned Sales representative up top, and a New interaction box below.

DO THIS

Take care of an account, step by step

1

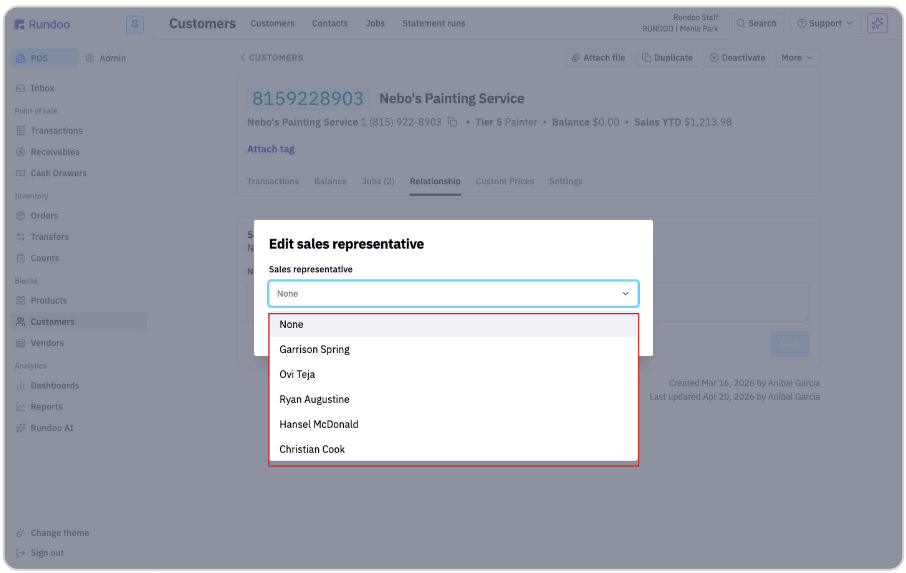
Open the customer's Relationship tab

From **POS**, go to **Customers**, search for the account, and open their profile. Click the **Relationship** tab. If nobody's assigned yet, the **Sales representative** line reads **None**.

2

Assign a sales rep

Under **Sales representative**, click **edit**. In the **Edit sales representative** box, open the dropdown, pick the staff member who owns this account, and click **Save**. A green **Representative saved** note flashes at the bottom. That's it, this account is now theirs.

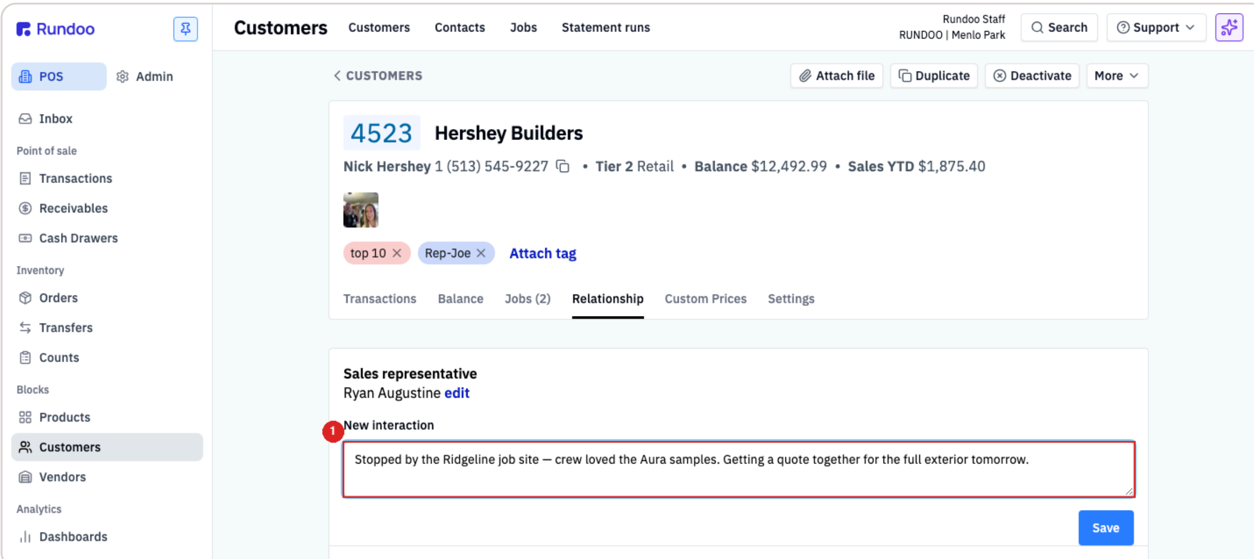


The dropdown lists every active staff member. Pick one, or pick None to unassign. One rep owns the account at a time.

3

Log an interaction

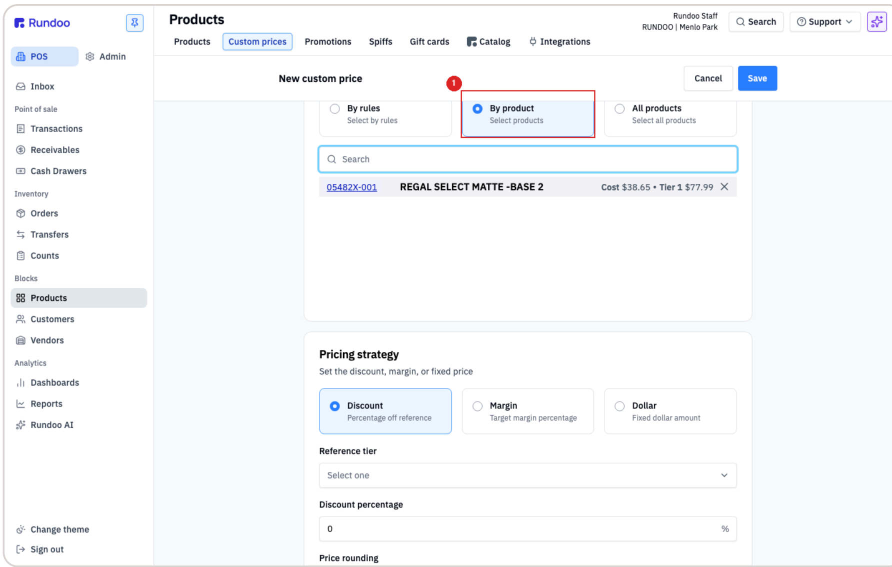
Right below the rep is a **New interaction** box. Type what happened, a visit, a call, a text, a voicemail, then click **Save**. Keep it short and specific: "Left VM about the exterior quote, following up Thursday" beats "talked to them." Each note is stamped with the date and the name of whoever wrote it, and it sits on the record for the whole team to see. No more sticky notes.



Type the note and click Save. It lands on the record newest-first, stamped with the date and author.

4 Give them a custom price

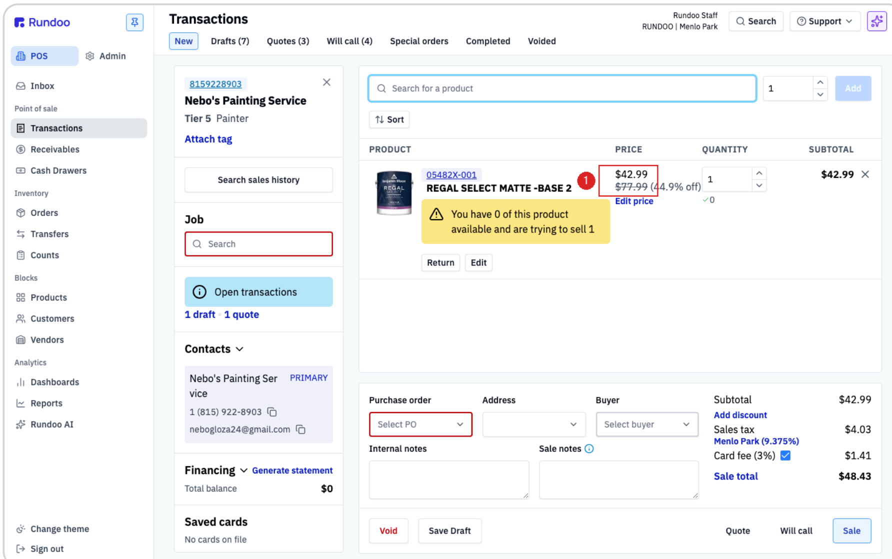
Now the special price. Go to **Products** in the left sidebar and click the **Custom prices** tab, then **+ Add custom price** in the top-right. On the **New custom price** form, fill it top to bottom: under **Assign to** pick the customer; under **Products** choose **By product** and add the item; under **Pricing strategy** choose how the price is set. **Dollar** is a flat price, **Discount** is a percentage off a reference tier, and **Margin** targets a gross margin. Set your schedule and location (it defaults to today, no expiration, all locations), then click **Save**.



The New custom price form. Pick By product and add the item, then choose a pricing strategy. One rule can carry several products.

5 Watch it ring at the counter

Here's the payoff. Next time that customer is on a sale, add them, add the product, and Rundoo does the rest. The line rings at the custom price automatically, with the customer's tier price crossed out beneath it and the savings called out. No override to remember, no math at the register. In the example below the paint rings at **$42.99** instead of the **$77.99** tier price, a 44.9% saving, and the cashier didn't touch a thing.



At the counter the custom price rings on its own, tier price struck through, savings shown. Same look as a promotion.

KEEP IT HANDY

At a glance

WHERE **POS → Customers → Relationship** Rep and interaction log live on the profile.	ASSIGN A REP **Sales representative → edit** One rep per account. Powers sales-by-rep reports.
CUSTOM PRICE **Products → Custom prices → + Add** Dollar, Discount off a tier, or Margin.	AT POS **Rings automatically** Tier price crossed out, savings shown.

Good to know

- Custom prices stack on top of tiers. Only the products you cover ring at the special price. Everything else still rings at the customer's tier.
- Changes apply on the next sale, not backwards. A sale already rung keeps the price it had, so a missed deal on a past ticket is a refund or adjustment, not a custom-price edit.
- A custom price is a starting price, not a floor. A cashier can still click Edit price on the line unless you ask Support to lock it down under Admin › Security.
- Notes feed the Interactions report (POS › Reports › Interactions), so you can see who has talked to which accounts and spot the ones going quiet.