GETTING STARTED WITH RUNDOO · SETUP

Their History, Their Balance

One customer record, two answers: what they bought and what they still owe. Open it from POS → Customers.

TWO TABS DO THE WORK

1

Transactions

What they bought. Sales, quotes, will-calls, special orders.

Filter by PO or date range

2

Balance

What they owe. Charge-account customers only.

Aging · History · Statements

3

Send summary

Hand the purchase list over while you are on the phone.

Email on file, or print a PDF

Pull it up in 4 steps

1. Go to **POS**, then **Customers**.
2. Search by name, phone, or customer ID and click the row.
3. **Transactions** tab for history. Filter by PO or date.
4. **Balance** tab for what they owe.

Inside the Balance tab

Aging, History, Statements

Aging buckets the balance: Current, 1 to 30, 31 to 60, and 61-plus days.

Why no Balance tab? It only shows for charge-account customers. What makes one is their finance term, like **Net 30 Statement**, not a toggle. Cash-and-carry customers pay every time, so they never have one.