GETTING STARTED WITH RUNDOO · SETUP

Their History, Their Balance

> See what a customer bought and what they still owe.

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

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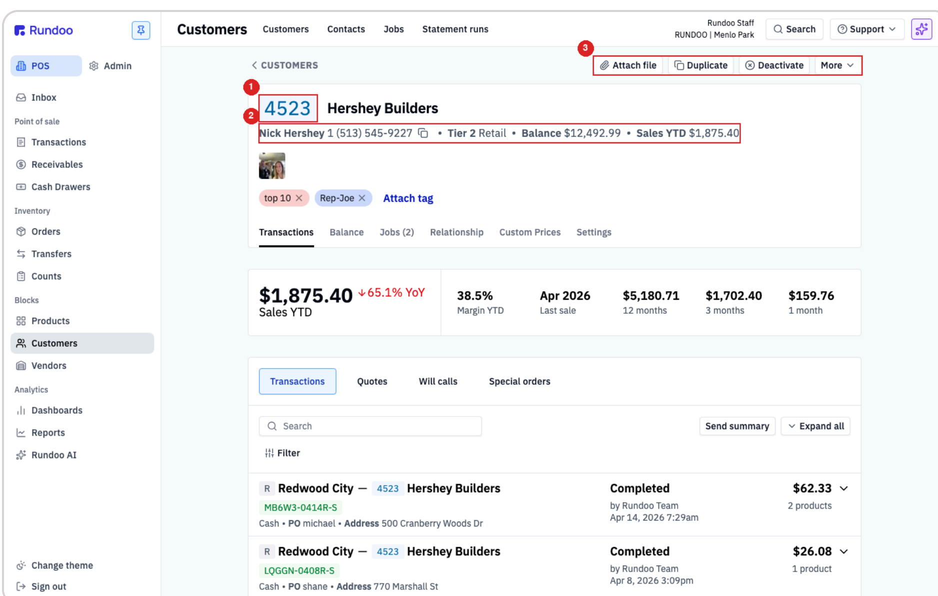
You know the phone call. One of your regulars, or the bookkeeper for a big contractor, is on the line and needs to know what they bought last month, or just wants to confirm what they still owe you. Both answers live on that customer's own record in Rundoo, a few clicks away. Two tabs do the work: Transactions shows you what they bought, and Balance shows you what they owe.

WHERE IT LIVES

One record, two answers

Open a customer and you land on their profile. Under the header, which shows their ID, name, phone, pricing tier, current balance, and Sales YTD, six tabs split up everything about them: **Transactions**, **Balance**, **Jobs**, **Relationship**, **Custom Prices**, and **Settings**. For "what did they buy" and "what do they owe," you only need the first two.



A contractor's record open on the Transactions tab. The header carries the current balance and Sales YTD; the tab row sits just below.

DO THIS

Answer the call in a few clicks

1. **Open the customer's account**

   From your main screen, go to **POS**, then **Customers**. Search by name, phone number, or customer ID, then click their row to open the record.

2. **Read the Transactions tab for what they bought**

   Rundoo lands you right on the **Transactions** tab. Up top are the quick numbers, **Sales YTD** and **Margin YTD** and their last sale. Below that is the full history of everything they have ever bought, quoted, put on will-call, or special-ordered.

3. **Filter to just what they are asking about**

   Say the bookkeeper only wants the purchases for one job. Click **Filter** and narrow the list by a **PO** number or a **date range** to pull up exactly that slice instantly.

4. **Send a summary while you are still on the phone**

   With the list showing what they asked for, click **Send summary**. Rundoo can email it straight to the address on file, or print a clean PDF copy for them. Job done, and you never left the counter.

5. **Open the Balance tab for what they owe**

   If this is a contractor with a house account, you will also see a **Balance** tab. Under **Aging** you get their total balance and how old each invoice is, bucketed into Current, 1 to 30, 31 to 60, and 61-plus days. The **History** sub-tab is the full ledger of charges and payments, and **Statements** holds every past statement run.

KEEP IT HANDY

At a glance

WHERE **POS → Customers → open the record** Search by name, phone, or customer ID.	TRANSACTIONS TAB **What they bought** Sales, quotes, will-calls. Filter by PO or date.
BALANCE TAB **What they owe** Aging, History, Statements. Charge accounts only.	SEND SUMMARY **Email or PDF** Hand the purchase list over on the spot.

Good to know

- The Balance tab only shows up for charge-account customers. What makes a customer a charge account is their finance term, like Net 30 Statement, not a setting you toggle on. Cash-and-carry customers pay every time, so they simply do not have one.
- Filtering by PO or by date range is the fast way to answer "just show me this one job" without scrolling their whole history.
- Your practice store is loaded with sample data, so pull up a customer and click through their history and balance as much as you like. Nothing you do there is real.