GETTING STARTED WITH RUNDOO · SETUP

Jobs (Tracking by Project)

A job is a named project you tag sales to. One contractor account, purchases and balances split by project.

WHAT A JOB IS (AND ISN'T)

1

A project tag

A name, an optional ID, and a job-site address, tied to one customer.

Sales stamped to it group per project

2

Its own Settings

Each job has its own credit limit, finance term, pricing tier, statement, and tax, set on the job.

Not inherited from the parent

3

Watch the credit limit

A will-call can show the job's lower limit, not the parent's. Check the job's Credit limit.

Job's Settings → Financing

Do it in 4 steps

1. In POS, open **Customers** → **Jobs** tab, click **Add job**.
2. Pick the **Customer** and a **Name**, then **Save**.
3. At the counter, attach the customer, then pick the **Job**.
4. Wrapped up? Edit its **Status** off Active and Save.

See the totals

Customer → Jobs sub-tab

A balance summary plus each project's own running total. Click a job for its history.

Attach the customer first. The job picker only shows that customer's jobs, and swapping the customer clears the job. No job picked just lands the sale on their **Main Account**, so nothing gets lost.

Pick it before you finish the sale. You can't re-tag a completed sale to a different job later, so surprise volume on Main Account usually means the picker got skipped.