

## GETTING STARTED WITH RUND00 · SETUP

# Track It by Job

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

**Not a mini-customer**

No per-job credit limit, pricing, tax, or standalone statement.

**Terms live on the parent customer**

3

**Need per-project terms?**

Different pricing or tax by project is a separate customer's job.

**Make a separate customer record**

**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.