Rundoo

GETTING STARTED WITH RUNDOO · SETUP

Track It by Job

> Keep a contractor's projects separate on one account.

Step-by-step walkthrough   ~3 min read   Companion to the 2:33 video

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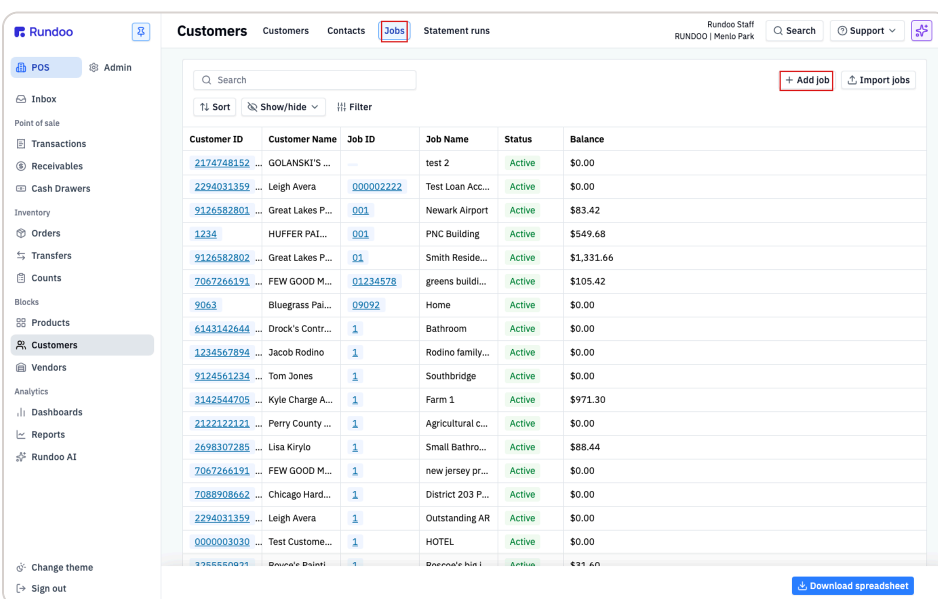
You know the situation. One of your best contractors, say Riverside Contracting, walks in with three projects running at once, and they want the purchases for each one kept separate on their account. You could juggle purchase orders for that, but Rundoo gives you a sharper tool: jobs. A job is just a named project you tag sales to, so a contractor's spend groups and reports per project while everything still rolls up under their one account.

WHERE JOBS LIVE

The Jobs tab

In **POS** mode, open **Customers** in the left sidebar, then switch to the **Jobs** top tab. That is the flat, cross-customer list: every job in every customer's account, with its customer, job ID, name, status, and balance. Handy for scanning by project name across your whole book. Each customer also has their own **Jobs** sub-tab on their detail page, for when you already know the customer and just want to see their projects.



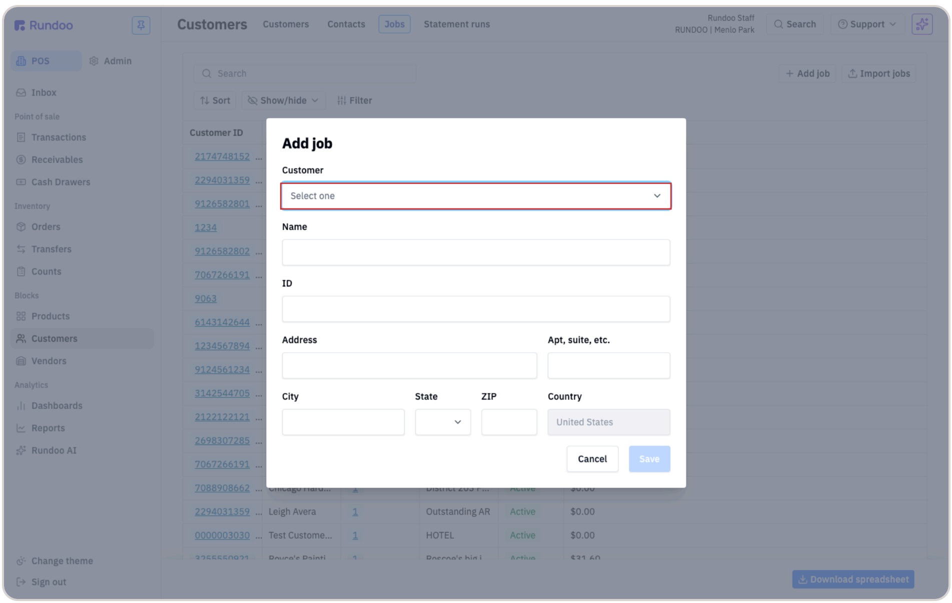
Customers → Jobs top tab: every job across every customer, with the Add job button up in the top-right.

DO THIS

Jobs, step by step

1 Add the job

From the **Jobs** top tab, click **Add job** in the top-right. You can do this from anywhere, because the first field on the form is the customer. The **Add job** form asks for only four things: pick the **Customer** the job belongs to (required, since jobs are tied to one customer), give it a **Name** you'll recognize at the counter like "123 Main Street Remodel" (required), and optionally add your own **ID** and a job-site **Address**. Leave the ID blank and Rundoo auto-numbers it. Click **Save** and the job is ready to use.



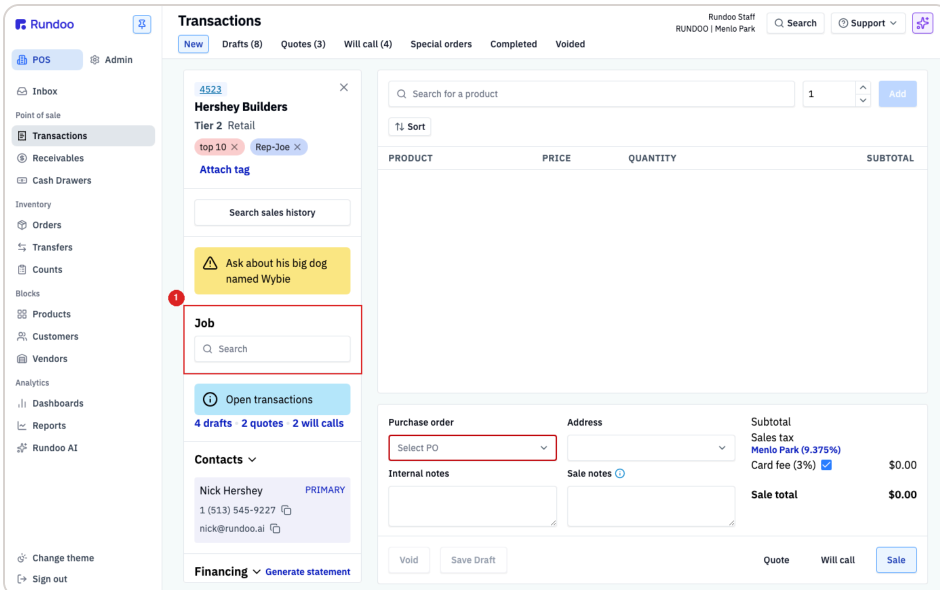
The whole job schema: Customer, Name, an optional ID, and an optional job-site address.

Prefer to start from the customer? Open the customer, switch to their **Jobs** sub-tab, and click **Add job** there. Same form, with the customer already filled in.

2

Tag a sale to the job at the counter

Ring up the sale the way you always do, and add the customer to the ticket first. As soon as the customer is attached, a **Job** section with a search box appears in the customer panel on the left of the cart. Type the job's name or ID, pick it, and everything on that ticket is stamped to that project.

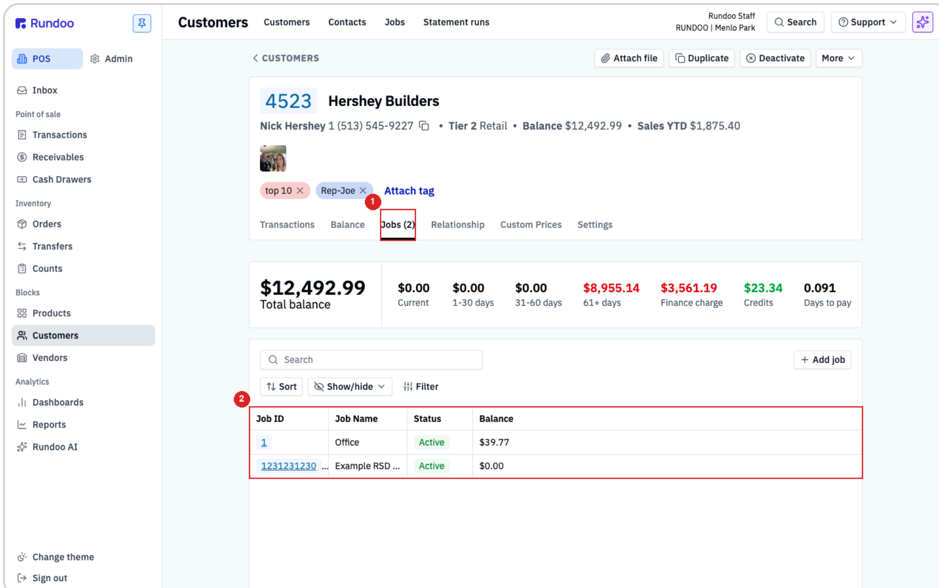


Attach the customer, then the Job search shows up. Pick the project and the sale is tagged.

If you leave the job blank, the sale still goes through, it just lands on the customer's **Main Account**, so nothing ever gets lost.

3 See each project's running total

Back on the customer's profile, their **Jobs** sub-tab shows a balance summary up top and a per-job balance table beneath, so you can see at a glance which project is driving their open balance without running a report. Click a job's name or ID to open its own detail page, with that project's transaction history and balance.



The customer's Jobs sub-tab: a balance summary plus each project's own running total.

4 Close out a finished job

When a project wraps, open the job from its detail page, change its **Status** away from **Active**, and **Save**. That keeps the job and all its history on the customer's record but pulls it out of the everyday picker at the counter, so a wrapped project doesn't clutter the list. Starting a similar project? Use the **Duplicate** button on a job's detail page so you don't have to retype its fields.

KEEP IT HANDY

Jobs at a glance

OPEN **Customers → Jobs tab** In POS mode. Or a customer's Jobs sub-tab.	CREATE **Add job → Customer + Name** ID and address optional. Then Save.
TAG A SALE **Attach customer, pick the Job** No job picked? It goes to Main Account.	CLOSE IT OUT **Edit Status, off Active** History stays. Jobs can't be deleted.

Good to know

- A job is a lightweight tag, not a mini-customer. There is no per-job credit limit, pricing, tax exemption, or standalone statement. Terms, pricing, and tax all live on the parent customer. If a contractor genuinely needs different terms or pricing per project, make a separate customer record instead.
- The job picker only shows jobs for the attached customer, and swapping the customer on a ticket clears the selected job. So attach the customer first, then pick the job.
- Pick the job before you complete the sale. You can't re-tag a finished sale to a different job later, so a lot of surprise volume on Main Account usually just means someone is skipping the picker.
- On a monthly statement, flip the **Include jobs** toggle and the customer's activity groups by project inside that one statement.