Rundoo

GETTING STARTED WITH RUNDOO · SETUP

Receipt & Security Settings

> Dial in your receipts, surcharges, and register security.

Step-by-step walkthrough ~5 min read Companion to the 6:35 video

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You already know how your shop runs, right down to the details: what your receipts look like, how long a quote is good for, and how your team uses the register. This is about making Rundoo match that. Two tabs in Admin do most of the work, **Communications** for what prints, and **Security** for who signs in. This is your practice store, so nothing here touches real inventory or your books. Poke around and find the setup that feels right.

WHERE YOU'RE HEADED

Two tabs in Admin

Everything on this page lives in **Admin** mode. Look at the left sidebar under Settings and you'll see two tabs stacked together: **Communications** and **Security**. We'll work through them top to bottom. Any time you change something, remember to hit **Save** before you move on.

WHAT PRINTS

The Communications tab, step by step

1 Open Communications and set what shows on receipts

From the main menu, click **Admin**, then **Communications** in the left sidebar. The General section at the top is where you control what your customer sees on paper. If you run a paint counter, you can turn on **Show color formulas on receipts**. You can also decide whether to **Show discount percentages on receipts**, or **Show crossed-out original price** so folks see the deal they got.

2 Set your receipt count and quote expiration

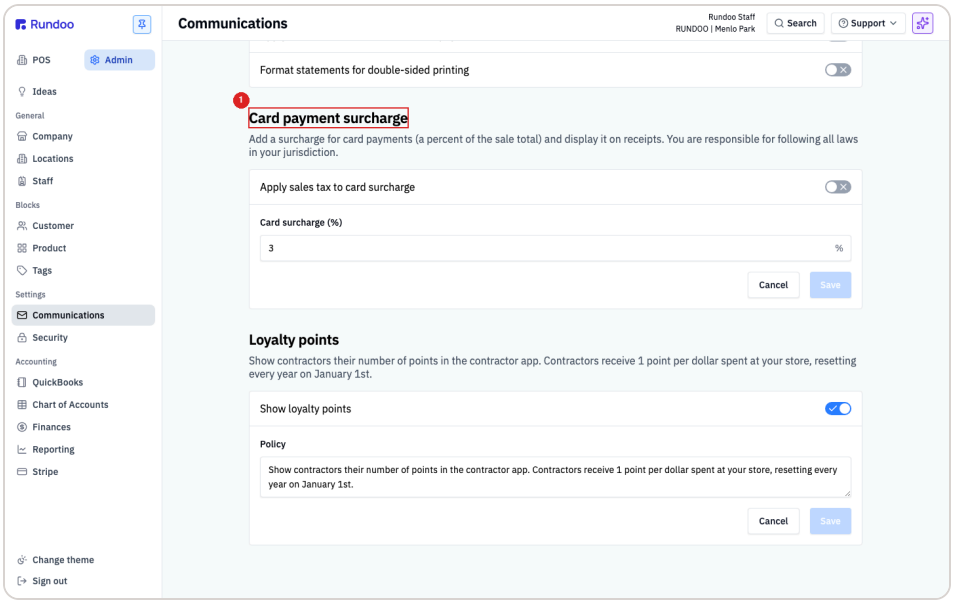
Scroll down to **Number of thermal receipts printed**. If one copy for the customer is all you need, change it to **1**. Just below, **Default quote expiration** sets how long a quote stays good. Bump it from **30** to **45** days if that fits how you price.

3 Type your return policy, then Save

Whatever you type into the **Return policy** box prints right at the bottom of every receipt, something like "Returns accepted within 30 days with original receipt." Write it once here and it rides along on every sale. Click **Save** before you leave the section. (We're skipping Statements for now, that gets its own video.)

4 Add a card payment surcharge, if you use one

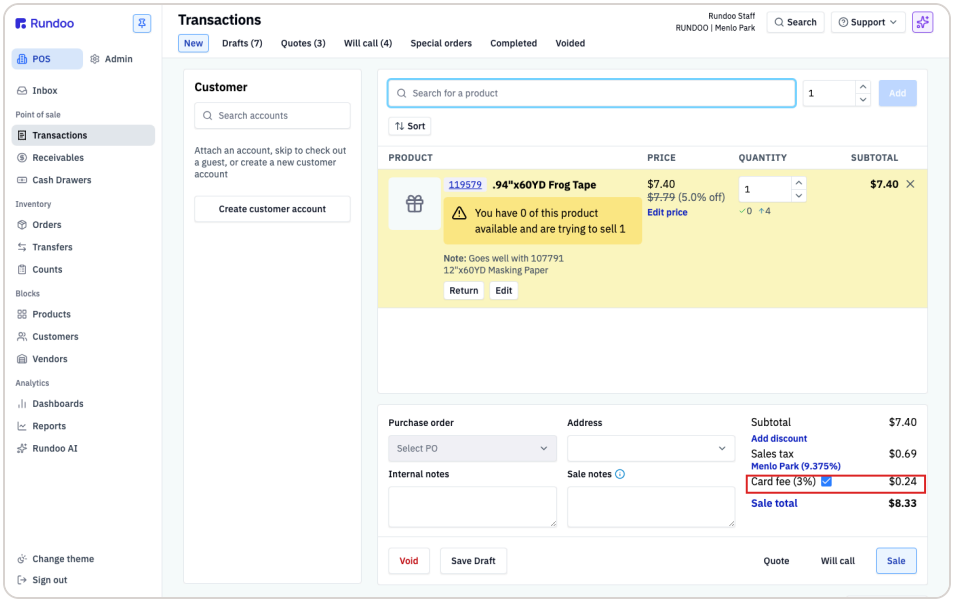
Scroll to **Card payment surcharge**. Some stores add a small percent to card sales to help cover processing costs. Type your rate into **Card surcharge (%)**, the field is capped between 0% and 4%, and 2 or 3 is typical depending on what your processor charges. The **Apply sales tax to card surcharge** toggle decides whether the surcharge itself gets taxed, and it's off by default. Hit **Save** and it's live. Setting the rate back to **0** turns it off again.



The Card payment surcharge section on the Communications tab. Rate is capped 0% to 4%, and it applies to card sales only.

5 See how it lands at the counter

Head to **POS** → **Transactions**, drop a simple item in the cart, and you'll see a **Card fee (3%)** line appear in the totals stack, right between **Sales tax** and **Sale total**. It only applies to the **Card** tender, never cash, check, or a charge account, and it prints on the customer's receipt so they see exactly what they paid. Need to waive it for one sale? Just uncheck the box next to the line and the total updates on the spot.



At POS, the Card fee line sits between Sales tax and Sale total. Uncheck the box to waive it for a single sale.

6 Turn on loyalty tracking (optional)

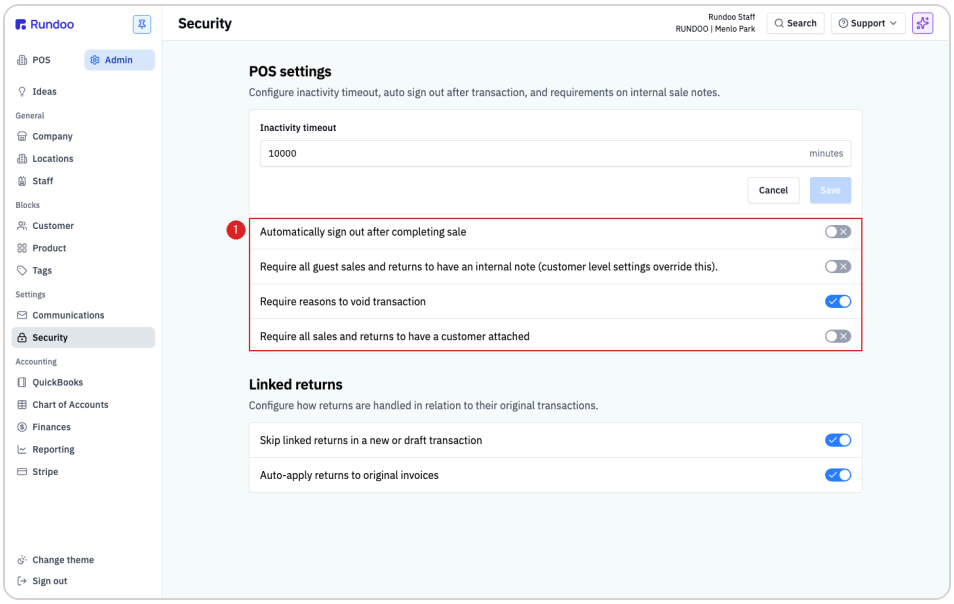
Last on the Communications tab is **Loyalty points**. Flip **Show loyalty points** on and Rundoo tracks one point for every dollar a customer spends, and shows contractors their points in the contractor app. Redeeming points is still being built, so today this is tracking only. No harm in turning it on now so the count is already running when redemption arrives.

WHO SIGNS IN

The Security tab, step by step

1 Open Security and set the idle timeout

Click **Security** in the left sidebar. The top section, **POS settings**, opens with **Inactivity timeout**, the number of minutes a register can sit idle before it signs the user out. A busy paint desk that steps away to mix wants a longer window than a single-terminal hardware counter that should lock fast. Type a number and hit **Save**.



The Security tab: Inactivity timeout up top, four company-wide toggles, and the Linked returns section below.

2 Decide whether to sign out after every sale

This is the important one. Toggle **Automatically sign out after completing sale** on and Rundoo signs the cashier out the moment a sale finishes, so the next person re-enters their Staff ID before ringing. That's perfect for a shared terminal at a busy counter, because every sale ties back to the right person. If one cashier runs the same register all shift, leave it off.

3 Watch the sign-out happen

Jump back to **POS** → **Transactions**, add a simple item, and tender it with **Cash**. The moment the sale completes, Rundoo drops straight to the sign-in screen, ready for the next person to log in.

4

Add friction where you want it

Two more handy toggles here. **Require all guest sales and returns to have an internal note** means a no-customer sale can't finish until the cashier types something in the **Internal notes** field, a simple way to have staff add their initials. And **Require reasons to void transaction** pops a confirmation when someone hits **Void**, so a stray click never wipes a cart the customer is still deciding on.

5

Leave the linked-returns defaults alone

Down in **Linked returns** are two toggles, and both default on, which is what most stores want. **Skip linked returns in a new or draft transaction** lets a cashier process a return without tying it to an original sale, handy for items sold before you were on Rundoo. **Auto-apply returns to original invoices** makes sure a linked return credits the exact invoice it came from, which keeps your books tidy. Unless your workflow deliberately separates returns from their originals, leave these on.

KEEP IT HANDY

The settings at a glance

CARD SURCHARGE **0% to 4%, card tender only** Off by default. Set the rate to 0 to turn it off.	THERMAL RECEIPTS **Set the printed count** Change from 2 to 1 for a single customer copy.
AUTO SIGN-OUT **On for shared terminals** Ties every sale to the cashier who rang it.	LOYALTY POINTS **1 point per $1** Tracking only for now. Redemption is coming.

Good to know

- Card surcharges are not legal in every state (Connecticut and Massachusetts prohibit them at last check, and others have their own rules). Rundoo gives you the tool, but following your local laws is on you, not us.
- For a customer who should never be surcharged, like a trade partner, flip **Exempt from card surcharge by default** on their customer record instead of remembering to uncheck the box every time.
- After you change the auto-sign-out setting, any register that's already signed in needs a quick page refresh (Cmd+R or Ctrl+R) to pick up the new behavior.
- None of this is set in stone. Try a setting, see how it changes the checkout routine, and adjust any time. If a setting's meaning for your store isn't clear, reach out to your Rundoo guide.