Rundoo

GETTING STARTED WITH RUNDOO · DOOEY

Dooey Agents (Daily Summary)

> Set up a Dooey agent that reviews the day and texts you what to notice.

Step-by-step walkthrough ~4 min read Companion to the 4:06 video

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It's the end of the day. You're locking up, and that question hits: what did I miss? Maybe it was an odd discount, a regular who bought something new, or a big sale your team handled while you were in the back. You can't be everywhere at once. An agent is Dooey set up to run on its own, so instead of remembering to ask, you teach Rundoo to check for you on a schedule and text you the answer. Think of it as your night manager, reviewing the day while you head home and telling you what to notice in the morning.

BEFORE YOU START

Chat asks now, agents run on their own

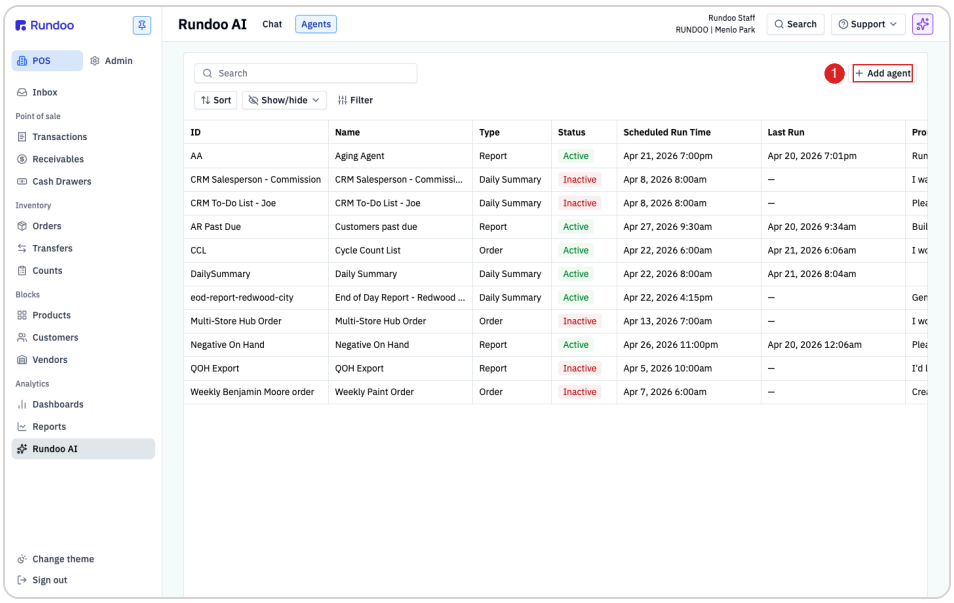
You may already know the **Chat** side of Dooey, where you sit down and ask a question. An agent is the other half: same model, same data, same plain-English prompts, but it runs on a schedule and the answer shows up without you opening the app. Chat is ask-now. Agents are set-it-and-forget-it. When a question is worth asking every single day, that's when you build an agent.

DO THIS

Build your first agent, step by step

1 Open Dooey and switch to Agents

In **POS** mode, head down the left sidebar to the **Analytics** group and open **Dooey**. Up top you'll see two tabs. Click the **Agents** tab. This list is your home base: every agent in your store shows here with its name, type, status, and scheduled run time. On a fresh store it may be empty, and that's fine.



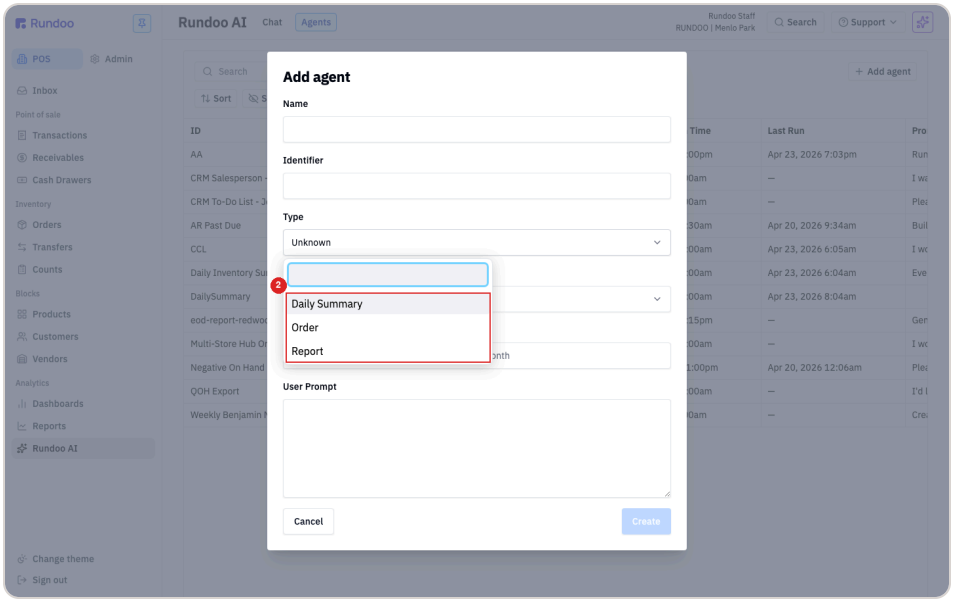
POS › Analytics › Dooey, then the Agents tab. The Add agent button sits top-right.

2 Click Add agent

Tap **+ Add agent** in the top-right corner. A modal opens with the fields you'll fill in. There are no templates or presets here, you write it yourself, and it only takes a minute.

3 Name it and pick a Type

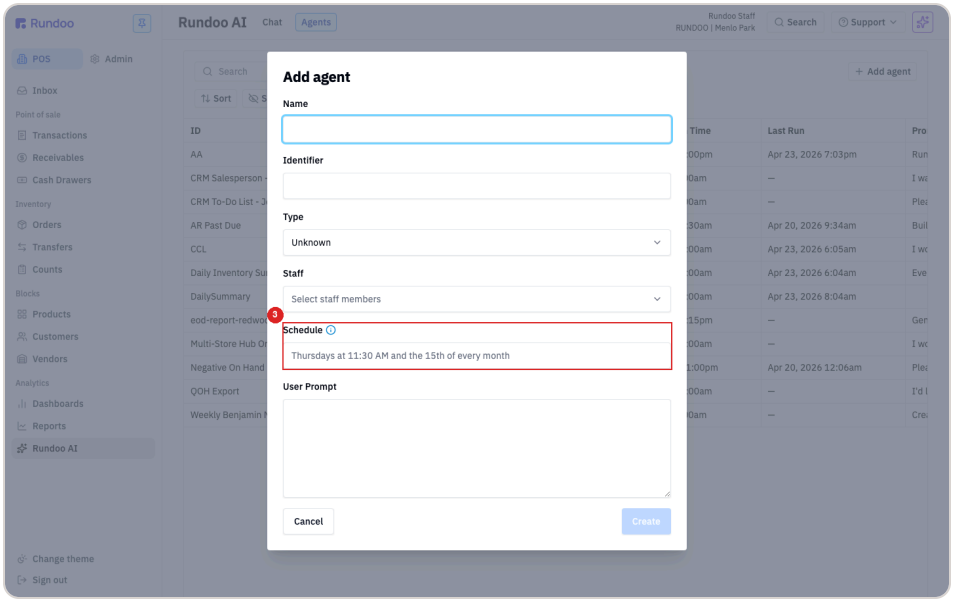
Give it a **Name** like "Daily AI Summary" and a short **Identifier** like "DAS" (a 2 to 4 letter shorthand that shows in the list's ID column). Then pick a **Type**. You get three choices for what the agent produces: **Daily Summary**, **Order**, or **Report**. That's the whole menu. For your first one, pick **Daily Summary**.



Name, Identifier, and Type. The three types are Daily Summary, Order, and Report.

4 Assign Staff and set the Schedule

Under **Staff**, choose who gets the results. Whoever is here gets the text, and only them, so just add yourself to start. Then type the cadence into **Schedule** in plain English, the way you'd say it out loud: **Every day at 6pm**. Rundoo reads it and works out the next run time for you.



Assign Staff, then write the schedule in plain English like "Every day at 6pm."

5 Write the User Prompt

The **User Prompt** is the agent's whole instruction. Tell it what to look at, what to flag, and how to send it. Keep it concrete, and end with "text it to my phone" so delivery is explicit. A solid starter for the Daily Summary:

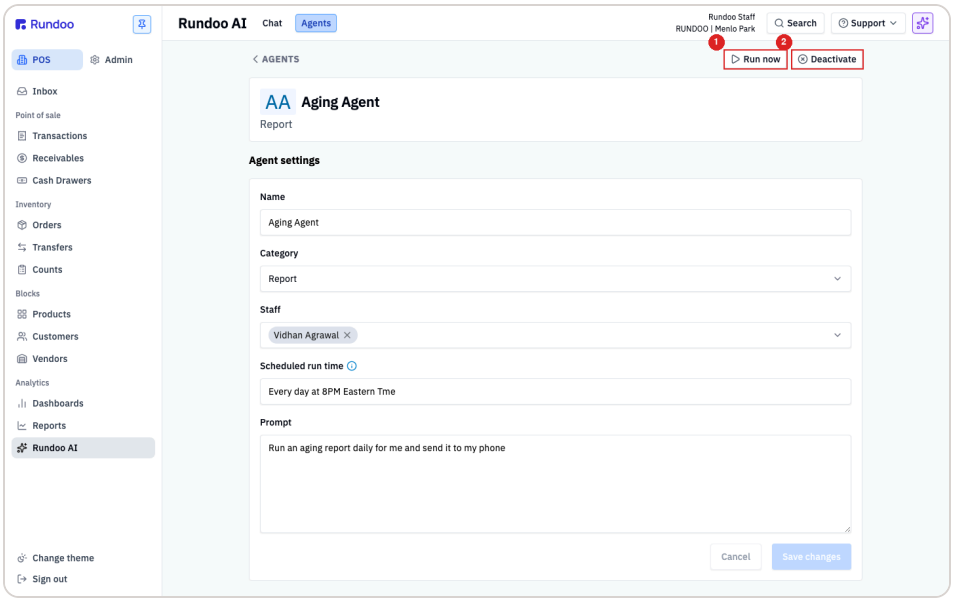
> *"At 6pm each day, review yesterday's sales and flag anything unusual, like low-margin transactions, customers who went quiet, or inventory running low. Text me the top 3 to 5 items with the transaction ID and a one-line reason each."*

6 Click Create

Once every required field is filled, the **Create** button in the bottom-right turns blue. Click it. Your new agent lands in the list with **Status** set to **Active** and the next scheduled run time already worked out. Remember this is your practice store, so you can build and test freely without touching your real numbers.

7 Test it with Run now

You don't have to wait until six o'clock to see it work. Click the agent to open its detail page, then click **Run now** in the top-right. In a moment you'll get a text with the summary you asked for, with links that take you right to the transaction or item inside Rundoo. The text arrives short on purpose. Tap a link to see the full picture.



The detail page: Run now fires it immediately, and Deactivate pauses it without losing the prompt.

8 Verify, then pause or edit any time

Always treat the text as your starting point, not the final word. Before you act on a dollar figure, tap the link and check it against the matching report or detail page, because AI can miscount. To pause an agent, open it and click **Deactivate**. It stays saved, ready for you to **Activate** again later. On the detail page, **Type** reads as **Category** and **Schedule** reads as **Scheduled run time**, but they're the same fields.

A real payoff, from a real store

Jason, a paint-store owner, got his 6pm Daily Summary one evening and it flagged a sale rung up near cost. He tapped the link and found a clerk had saved a one-time competitive price months earlier that the old system kept applying, week after week. A ten-minute fix recovered more than $4,200 in margin he never would have caught by hand. Roughly ten minutes a day with the summary caught what hours of report-diving hadn't.

KEEP IT HANDY

Agents at a glance

WHERE

POS › Analytics › Dooey › Agents

Same list to build, edit, or pause one later.

THREE TYPES

Daily Summary · Order · Report

Pick the shape first, then write the prompt.

DELIVERY

Assigned Staff's phone

SMS by default. Email via each person's Notifications tab.

SCHEDULE

Plain English

"Every day at 6pm," "Fridays at noon." Specific beats vague.

Good to know

- An agent's output is AI-generated from your live data, so verify a number against the report it references before you send a PO, credit a customer, or reprice a line.
- Assigned Staff need a phone number saved in Rundoo with SMS turned on, or the text has nowhere to land. Add two people for owner-plus-manager coverage.
- Agents only send to assigned Staff's own phone or email. There's no way to send one to an outside address like a customer's inbox.
- When you're ready, come back and build another to draft your weekly reorders or run a recurring report.