GETTING STARTED WITH RUNDOO · SETUP

Building a Custom Report

Build a report once, save it under a clear name, and your whole team can run it again in one click.

THE THREE MOVES

1

Build

Pick the data, then the columns that matter.

Create report → pick a dataset

2

Name

Call it the question it answers, not the dataset.

Save → pencil to rename

3

Share

It's on the team's list already. Point someone to it.

Send the browser URL

Build one in 5 steps

1. In POS, open **Analytics → Reports**, then **Create report**.
2. Pick the **base data** first. It sets what one row means.
3. Set the **Date range**, **Select columns**, click a header to **sort**.
4. Hit **Save**, then the **pencil** to rename it.
5. Reopen from the **Custom reports** tab to edit or share.

Shared by default

One team list

Every custom report shows on the **Custom reports** tab. No private toggle. **Duplicate** before heavy edits.

Save is greyed out? That's normal. The button only wakes up once you've changed something, and nothing is permanent until you click it.

No "balance over zero" filter: sort by the aging bucket and stop scrolling at the $0 rows, or Download to CSV and drop them in a spreadsheet.