Rundoo

GETTING STARTED WITH RUNDOO · SETUP

Building a Custom Report

> Build one, name it, and your whole team can run it again in one click.

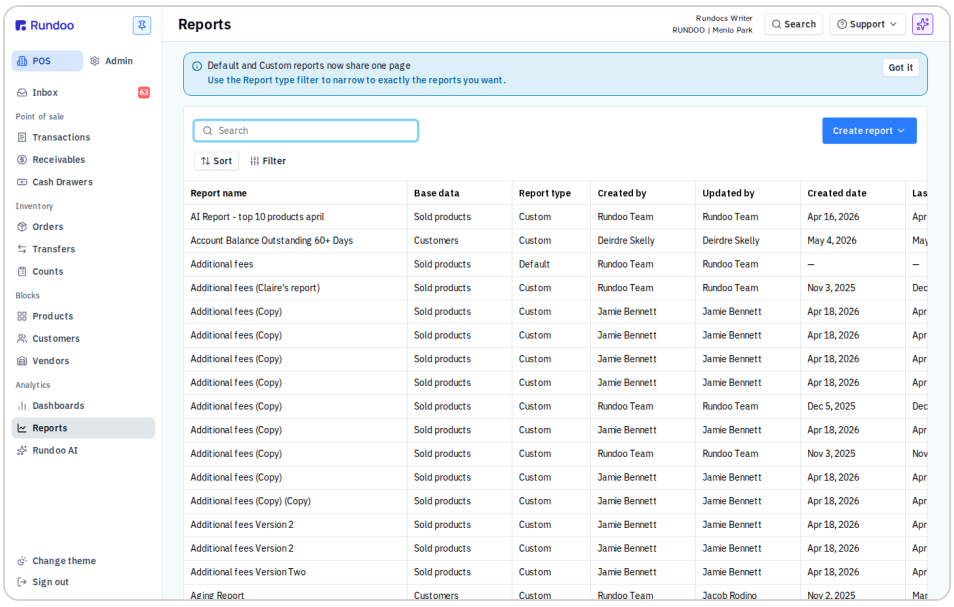
Step-by-step walkthrough ~4 min read Companion to the 4:53 video

You already know the handful of questions you ask about your business every week. Who owes me money that's overdue. What moved this month. Which items are gathering dust. Rundoo's built-in reports cover a lot of that, but not every question you have is on the list. When one isn't, you build your own: pick the data, shape it once, then save it under a name your whole team can reopen in one click. This is the video where you stop asking the same question over and over and turn it into a permanent answer.

WHERE YOUR REPORTS LIVE

One Reports page, defaults and custom together

In POS mode, open the **Analytics** group in the left sidebar and click **Reports**. Rundoo's roughly 50 built-in reports and everything your team has built sit on the same page. The **Report type** column tells them apart, and the **Filter** pill can narrow the list to just Report type = Custom when it gets long.



Defaults and your custom reports live on one Reports page. The Report type column tags each row.

DO THIS

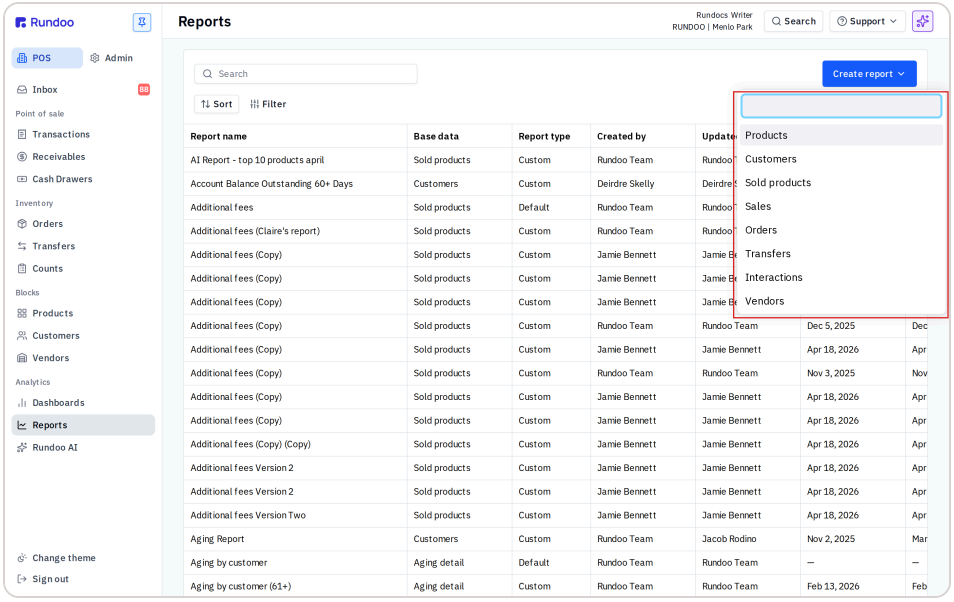
Build a report, step by step

1 Start a new report

From the Reports page, click **Create report** in the top-right corner. If a built-in report is already close to what you want, there's a shortcut: open it, hit **Duplicate**, and edit the copy instead of starting from a blank one.

2 Pick your base data first

This is the most important choice on the whole page. The base data is the dataset your report pulls from, and it decides what a single row means. Think of it as choosing the shape of the row before anything else. Building a past-due call list? You want one row per customer, so choose **Customers**. The everyday datasets sit at the top of the list; scroll for more specialized ones like Transactions, Aging detail, or Price rules.



Create report opens a scrollable list of datasets. Pick the one whose row shape matches your question.

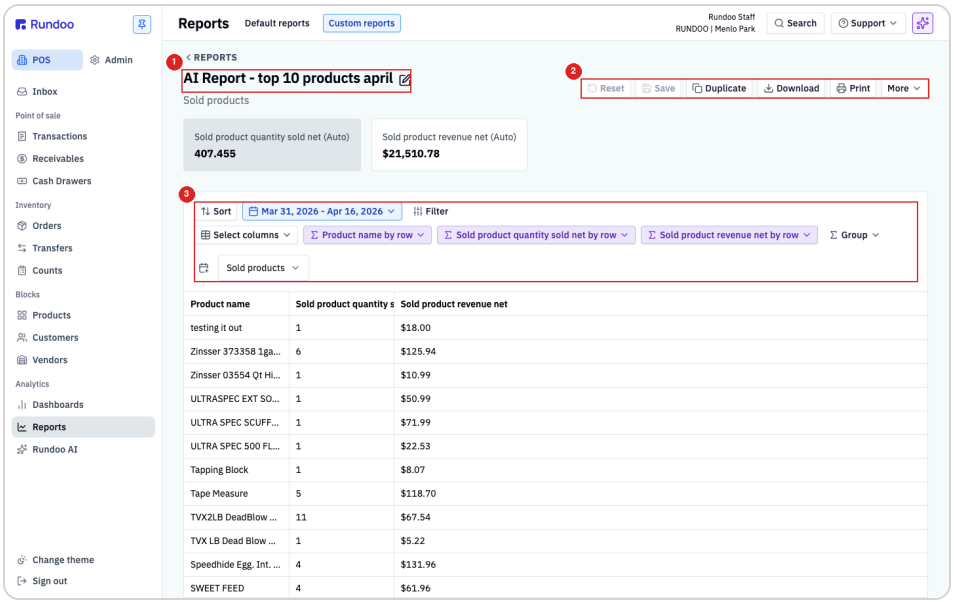
3 Shape it for the job

Now you're in the builder. Set the **Date range** pill to **All time** so an older account that hasn't transacted lately still shows up. Open **Select columns** and add what you need to make the calls: **Customer name**, **Customer primary contact phone**, and the three balance buckets, **Customer balance 1 30 days**, **31 60 days**, and **61 plus days**. Then click the **61 plus days** column header to sort it high to low, and the most overdue accounts float to the top.

One thing to expect: there's no "balance greater than zero" filter in this dataset. Sorting and stopping when you hit the $0 rows is the quick way. If you want a clean spreadsheet, click **Download** for a CSV and delete the zero rows there.

4 Save it, then name it well

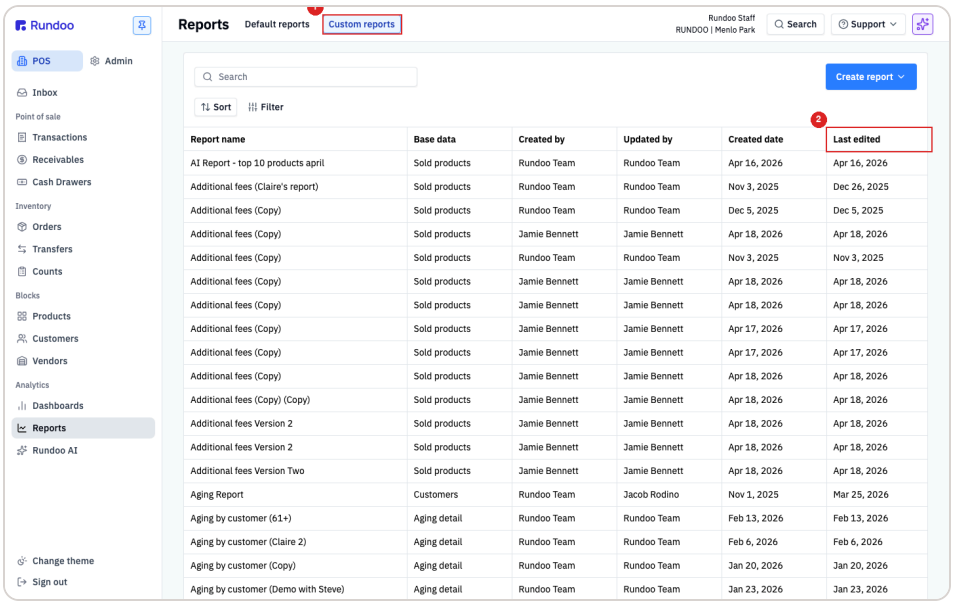
When it looks right, click **Save** in the action cluster at the top-right. Nothing is permanent until you do, and the button stays greyed out until you've actually changed something. Rundoo gives it a default name, usually the dataset. Click the pencil icon next to the title and rename it for the job it does, like "Past-due customers call list." Name it the question it answers, not the dataset, so the next person who scrolls the list knows exactly what it's for.



The pencil renames the report. The action cluster (top-right) holds Reset, Save, Duplicate, Download, Print, and More.

5 Find it, edit it, share it

Your new report now lives on the Reports page, tagged **Custom**, ready to run anytime. Open it from the **Custom reports** tab and you land right back in the builder, pre-loaded with your columns and sort. Two things worth remembering: a custom report is a shared tool, so any edit you save updates it for the whole team, and there are no personal copies. If you want to try a different version without touching the original, hit **Duplicate** first. And because these reports are shared with everyone by default, the easiest way to point a teammate at one is to copy the link from your browser and send it.



The Custom reports tab is your team's shared list. Send the browser URL to drop a teammate straight into one.

KEEP IT HANDY

Custom reports at a glance

WHERE **POS → Analytics → Reports** Defaults and custom share one page.	START **Create report (top-right)** Or Duplicate a close default and edit it.
FIRST CHOICE **Pick the base data** It decides what one row means.	SAVE **Greyed until you change something** Then use the pencil to name it.

Good to know

- Editing a saved custom report changes it for your whole team the moment you hit Save. Want a private variant? Duplicate first, then edit the copy.
- There's no "balance greater than zero" filter. Sort by the aging bucket and stop scrolling at the $0 rows, or Download to CSV and drop them in a spreadsheet.
- The on-screen table shows the first 1,000 rows (your totals still count every row). Need them all? Download ships up to 50,000 rows.
- Deleting a custom report is permanent and affects everyone. If a teammate built it, check with them before you delete.