

Your Own Reports

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

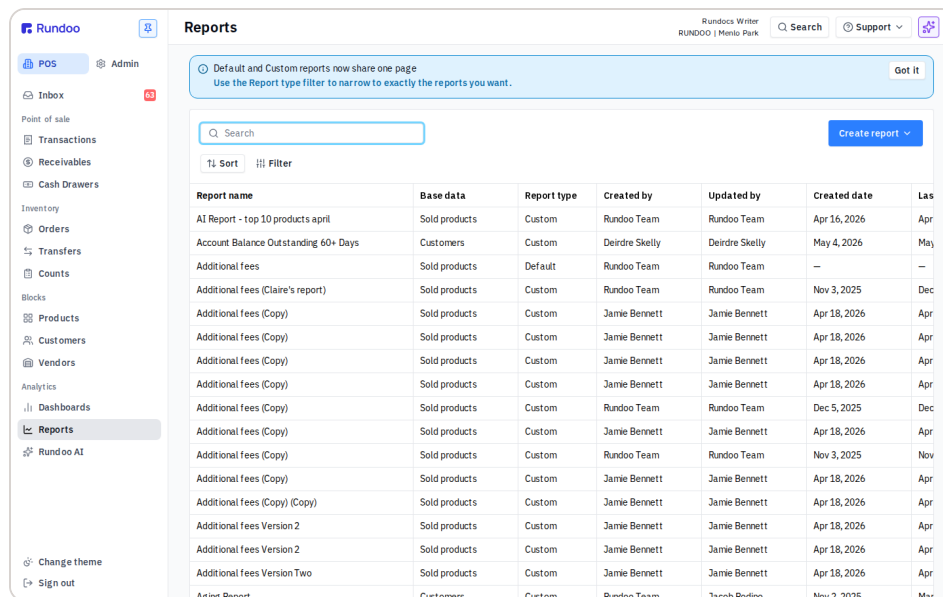
Step-by-step walkthrough ~4 min read Companion to the [4:53 video](#)

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.



Report name	Base data	Report type	Created by	Updated by	Created date	Last updated
AI Report - top 10 products april	Sold products	Custom	Rundoo Team	Rundoo Team	Apr 16, 2026	Apr 16, 2026
Account Balance Outstanding 60+ Days	Customers	Custom	Deirdre Skelly	Deirdre Skelly	May 4, 2026	May 4, 2026
Additional fees	Sold products	Default	Rundoo Team	Rundoo Team	—	—
Additional fees (Claire's report)	Sold products	Custom	Rundoo Team	Rundoo Team	Nov 3, 2025	Dec 3, 2025
Additional fees (Copy)	Sold products	Custom	Jamie Bennett	Jamie Bennett	Apr 18, 2026	Apr 18, 2026
Additional fees (Copy)	Sold products	Custom	Jamie Bennett	Jamie Bennett	Apr 18, 2026	Apr 18, 2026
Additional fees (Copy)	Sold products	Custom	Jamie Bennett	Jamie Bennett	Apr 18, 2026	Apr 18, 2026
Additional fees (Copy)	Sold products	Custom	Jamie Bennett	Jamie Bennett	Apr 18, 2026	Apr 18, 2026
Additional fees (Copy)	Sold products	Custom	Rundoo Team	Rundoo Team	Dec 5, 2025	Dec 5, 2025
Additional fees (Copy)	Sold products	Custom	Jamie Bennett	Jamie Bennett	Apr 18, 2026	Apr 18, 2026
Additional fees (Copy)	Sold products	Custom	Rundoo Team	Rundoo Team	Nov 3, 2025	Nov 3, 2025
Additional fees (Copy)	Sold products	Custom	Jamie Bennett	Jamie Bennett	Apr 18, 2026	Apr 18, 2026
Additional fees (Copy) (Copy)	Sold products	Custom	Jamie Bennett	Jamie Bennett	Apr 18, 2026	Apr 18, 2026
Additional fees Version 2	Sold products	Custom	Jamie Bennett	Jamie Bennett	Apr 18, 2026	Apr 18, 2026
Additional fees Version 2	Sold products	Custom	Jamie Bennett	Jamie Bennett	Apr 18, 2026	Apr 18, 2026
Additional fees Version Two	Sold products	Custom	Jamie Bennett	Jamie Bennett	Apr 18, 2026	Apr 18, 2026
AI Init Report	Customers	Custom	Rundoo Team	Jacob Rodino	Nov 2, 2025	Mar 2, 2026

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

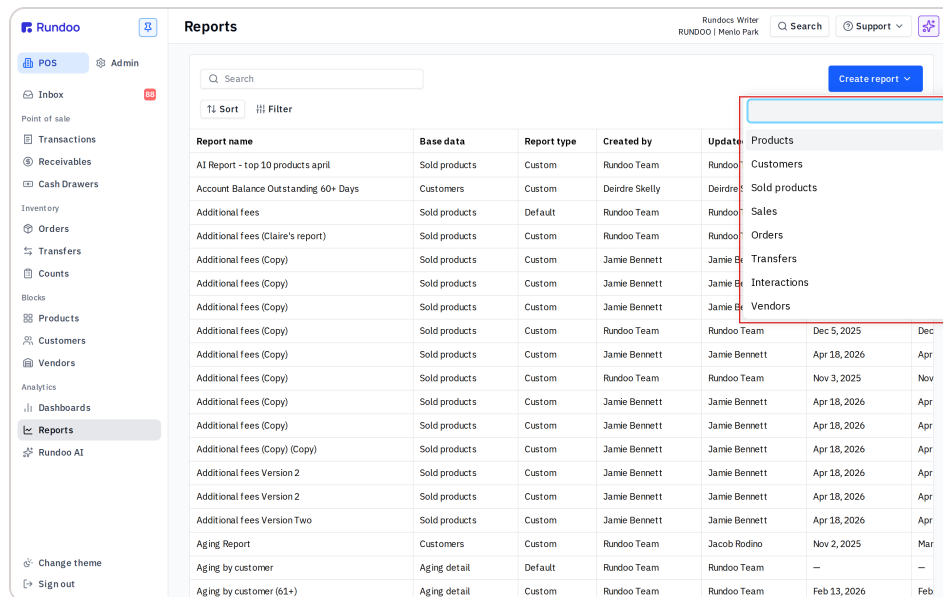
Start a new report

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 screenshot shows the Rundoo Reports builder interface. On the left is a sidebar with navigation options: POS, Admin, Inbox, Point of sale, Transactions, Receivables, Cash Drawers, Inventory, Orders, Transfers, Counts, Blocks, Products, Customers, Vendors, Analytics, Dashboards, Reports (selected), and Rundoo AI. The main area is titled 'Reports' and shows a report titled 'AI Report - top 10 products april'. The report displays two summary cards: 'Sold product quantity sold net (Auto)' with a value of 407,455 and 'Sold product revenue net (Auto)' with a value of \$21,510.78. Below these are filters for 'Sort' (Mar 31, 2026 - Apr 16, 2026) and 'Filter'. The 'Select columns' section shows columns for 'Product name by row', 'Sold product quantity sold net by row', and 'Sold product revenue net by row'. The table below lists products and their corresponding quantities and revenue.

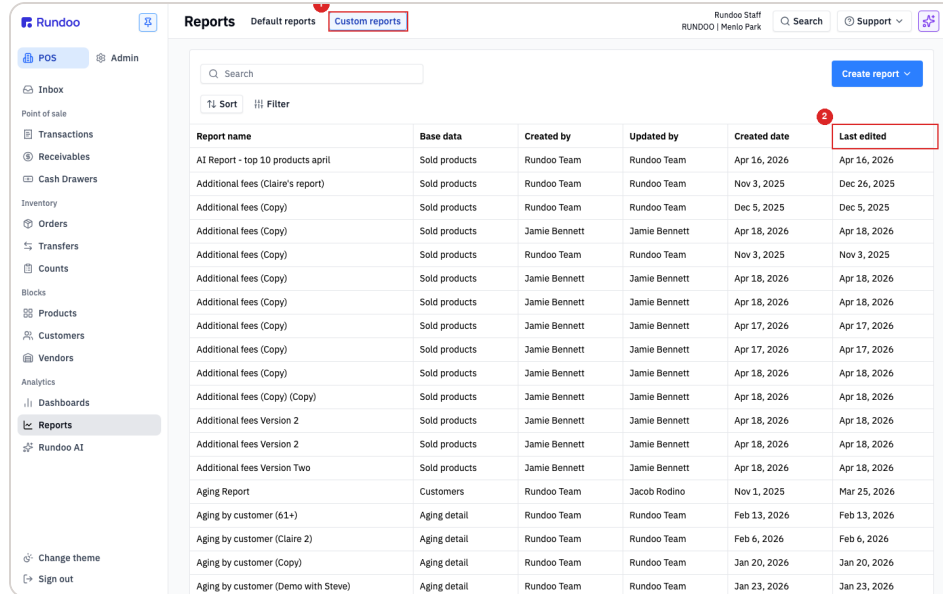
Product name	Sold product quantity s	Sold product revenue net
testing it out	1	\$18.00
Zinsser 373358 1ga...	6	\$125.94
Zinsser 03554 Qt Hi...	1	\$10.99
ULTRASPEC EXT SO...	1	\$50.99
ULTRA SPEC SCUFF...	1	\$71.99
ULTRA SPEC 500 FL...	1	\$22.53
Tapping Block	1	\$8.07
Tape Measure	5	\$118.70
TVX2LB DeadBlow ...	11	\$67.54
TVX LB Dead Blow ...	1	\$5.22
Speedhide Egg, Int. ...	4	\$131.96
SWEET FEED	4	\$61.96

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.



Report name	Base data	Created by	Updated by	Created date	Last edited
AI Report - top 10 products april	Sold products	Rundoo Team	Rundoo Team	Apr 16, 2026	Apr 16, 2026
Additional fees (Claire's report)	Sold products	Rundoo Team	Rundoo Team	Nov 3, 2025	Dec 26, 2025
Additional fees (Copy)	Sold products	Rundoo Team	Rundoo Team	Dec 5, 2025	Dec 5, 2025
Additional fees (Copy)	Sold products	Jamie Bennett	Jamie Bennett	Apr 18, 2026	Apr 18, 2026
Additional fees (Copy)	Sold products	Rundoo Team	Rundoo Team	Nov 3, 2025	Nov 3, 2025
Additional fees (Copy)	Sold products	Jamie Bennett	Jamie Bennett	Apr 18, 2026	Apr 18, 2026
Additional fees (Copy)	Sold products	Jamie Bennett	Jamie Bennett	Apr 18, 2026	Apr 18, 2026
Additional fees (Copy)	Sold products	Jamie Bennett	Jamie Bennett	Apr 17, 2026	Apr 17, 2026
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Additional fees Version 2	Sold products	Jamie Bennett	Jamie Bennett	Apr 18, 2026	Apr 18, 2026
Additional fees Version 2	Sold products	Jamie Bennett	Jamie Bennett	Apr 18, 2026	Apr 18, 2026
Additional fees Version Two	Sold products	Jamie Bennett	Jamie Bennett	Apr 18, 2026	Apr 18, 2026
Aging Report	Customers	Rundoo Team	Jacob Rodino	Nov 1, 2025	Mar 25, 2026
Aging by customer (61+)	Aging detail	Rundoo Team	Rundoo Team	Feb 13, 2026	Feb 13, 2026
Aging by customer (Claire 2)	Aging detail	Rundoo Team	Rundoo Team	Feb 6, 2026	Feb 6, 2026
Aging by customer (Copy)	Aging detail	Rundoo Team	Rundoo Team	Jan 20, 2026	Jan 20, 2026
Aging by customer (Demo with Steve)	Aging detail	Rundoo Team	Rundoo Team	Jan 23, 2026	Jan 23, 2026

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.