Rundoo

GETTING STARTED WITH RUNDOO · TRANSACTIONS

Logging In, Staff & Permissions

Get into Rundoo, add your team, and set who can do what.

Step-by-step walkthrough ~4 min read Companion to the 6:05 video

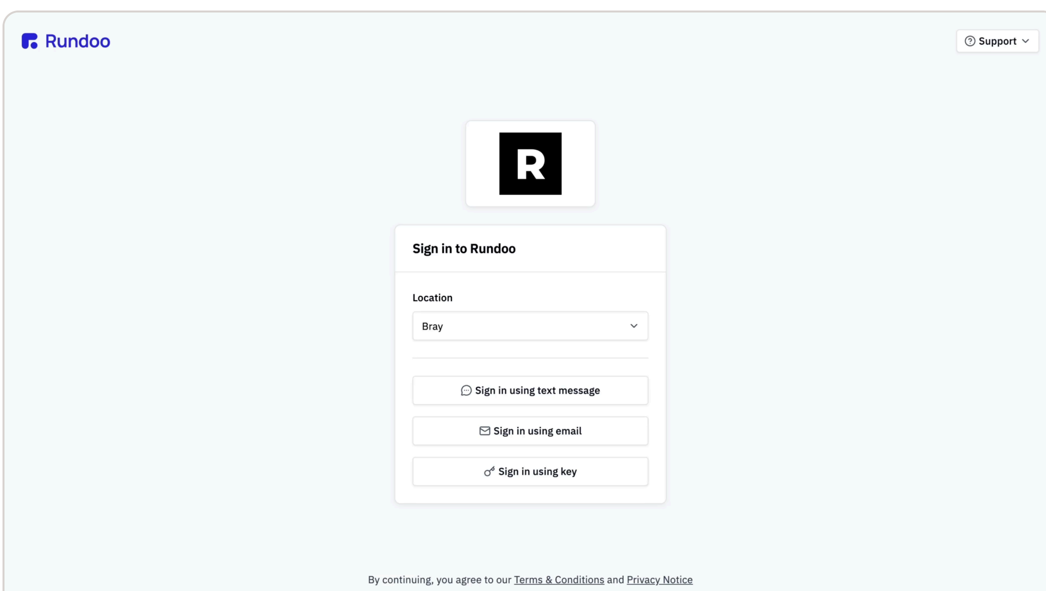
Your first morning on Rundoo comes down to two things: get yourself signed in, and get your crew in with the right keys to the right doors. Neither takes long, and you're the one holding the keys. Here's the whole setup, from your own sign-in to handing each person exactly the access they need.

DO THIS

Sign in, add your team, set access

1 Sign in: pick your location first

This is the one thing that trips everyone up on day one, so it goes first. On the sign-in screen, **choose your Location from the dropdown before anything else**. The sign-in buttons do not appear until you do, so if the card looks empty, that is why. If you have only one store, you are already set.



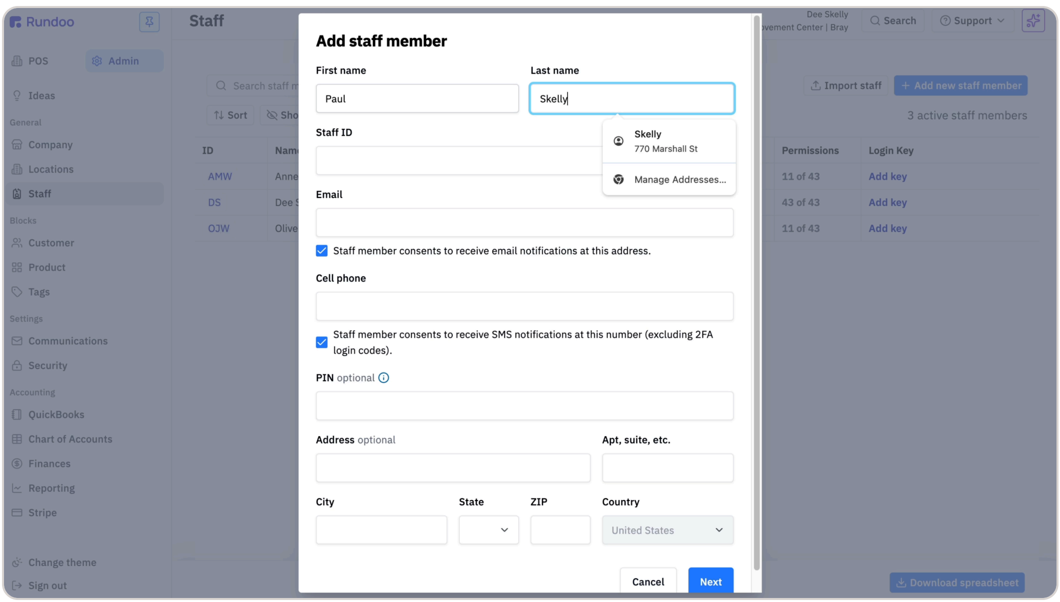
Choose your Location first, then the three sign-in options appear: text message, email, or security key.

Choose how you sign in

You have three secure ways in: a code by **text message**, a code by **email**, or a tap of a **security key** if your store uses them. Most folks use email. One catch: on the email path, Rundoo asks for your **Staff ID**, the short code on your profile (like an initial or a number), not your email address. Type in the six-digit code it sends, and you're in. The code lasts only a couple of minutes, so grab it while it's fresh, or hit **Send another code**.

Add a team member

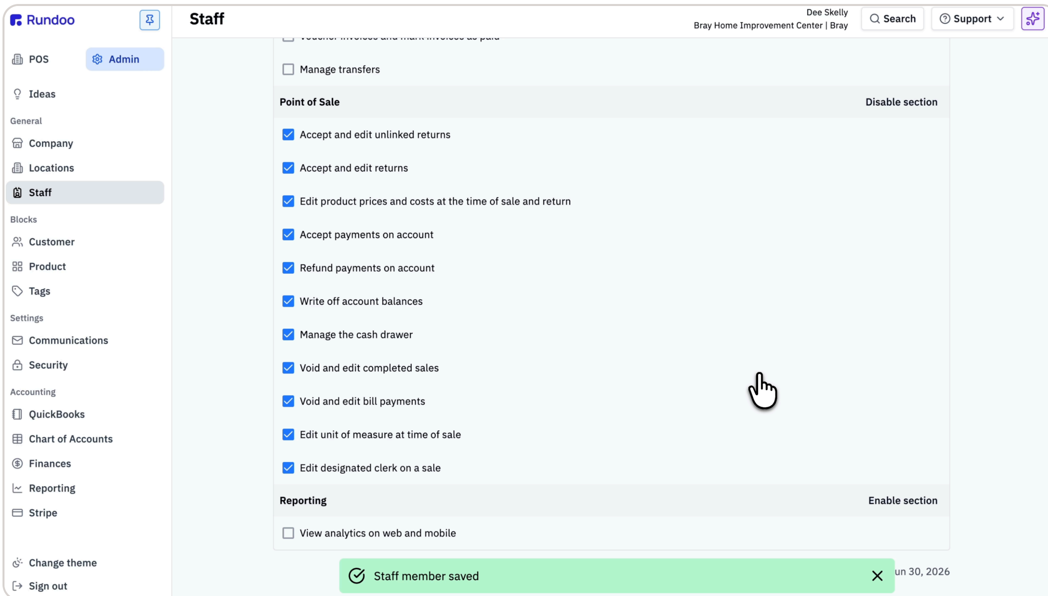
In **Admin** mode, open **Staff** and click **Add new staff member**. All Rundoo needs is a **First name, Last name, Staff ID, and Email**. Add a cell phone only if they'll sign in by text. Bringing on a whole crew at once? **Import staff** loads them from a spreadsheet so you're not typing one at a time.



The required fields are First name, Last name, Staff ID, and Email. Everything below is optional.

4 Set their permissions

Open anyone's **Permissions** tab. Rather than sweating every switch, think in three shapes: **the owner** gets everything, **a manager** gets most of it but maybe not the back-office admin settings, and **a cashier** just needs to ring sales. Use **Enable section** or **Disable section** to flip a whole group at once, then fine-tune. There is no Save button. Rundoo saves each change the moment you make it.



Permissions are grouped into sections. Flip a whole section on or off, then adjust individual checkboxes.

5 One register, many clerks? Use shared sign-in with a PIN

If clerks trade off on one register all day, don't make them log all the way in and out. Add a dedicated register account (name it something like "Cash Register 1"), turn on **Enable shared sign-in** on its General tab, and give each clerk a short **PIN**. They tap their PIN to ring, and every sale is stamped with who rang it. Just remember: the PIN is about *who did it*, not *what they can do*. Permissions always come from the shared register account, so set its access to match your floor.

6 When someone leaves, deactivate (don't delete)

When a team member moves on, switch their profile to **Deactivated**. That cuts off their sign-in right away but keeps all their past sales on your books where they belong. There is no hard delete, and you can **Reactivate** them later if they come back.

KEEP IT HANDY

Team setup at a glance

CAN'T SEE SIGN-IN BUTTONS? **Pick your Location first** They only appear after you choose a store.	EMAIL SIGN-IN ASKS FOR **Your Staff ID, not email** The short code on your profile. Code lasts ~2 min.
ADD A MEMBER **Staff → Add new staff member** First, Last, Staff ID, Email required.	PERMISSIONS SAVE **Instantly, per checkbox** No Save button. Think owner / manager / cashier.

Good to know

- Three role shapes cover almost everyone: owner (all on), manager (most, minus admin), cashier (ring only). Start there, then fine-tune.
- A shared PIN is for attribution, not permissions. What a clerk can do comes from the shared register account, so set that account's access carefully.
- Deactivate, don't delete. It revokes access now and keeps the sales history intact. Reactivate any time.
- Adding and deactivating staff is real, not practice data, so do it in your staged store during onboarding.