Customer Credits

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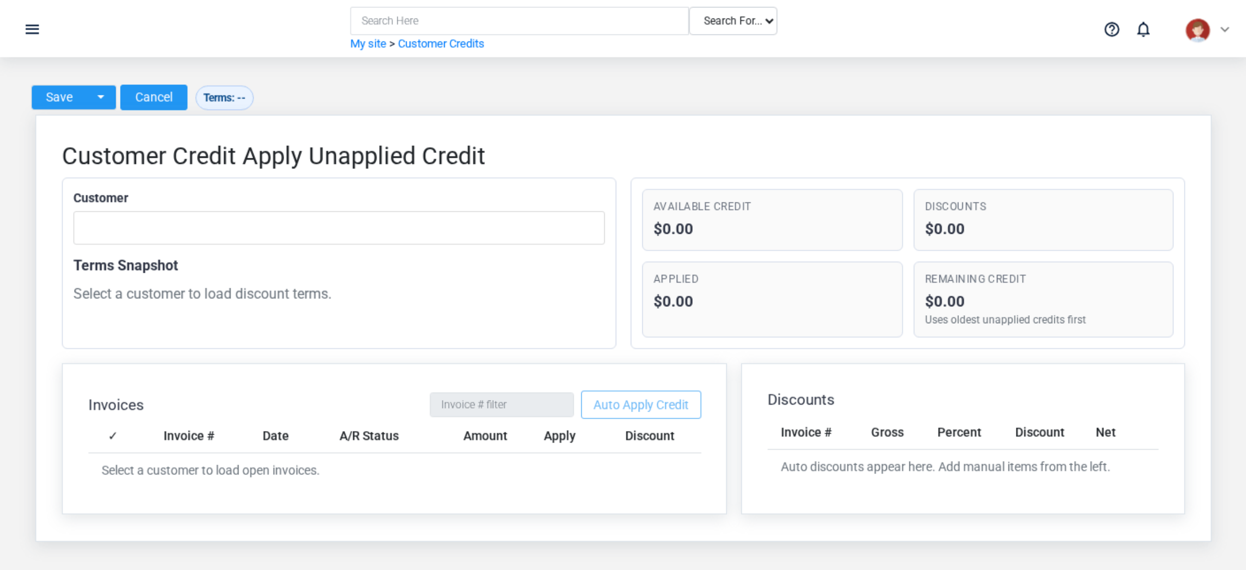
Purpose and when to use this record



The Customer Credits overview screen in the Brisk documentation demo.

Record money or credit owed back to a customer and preserve its connection to the originating sale or tender.

At a glance

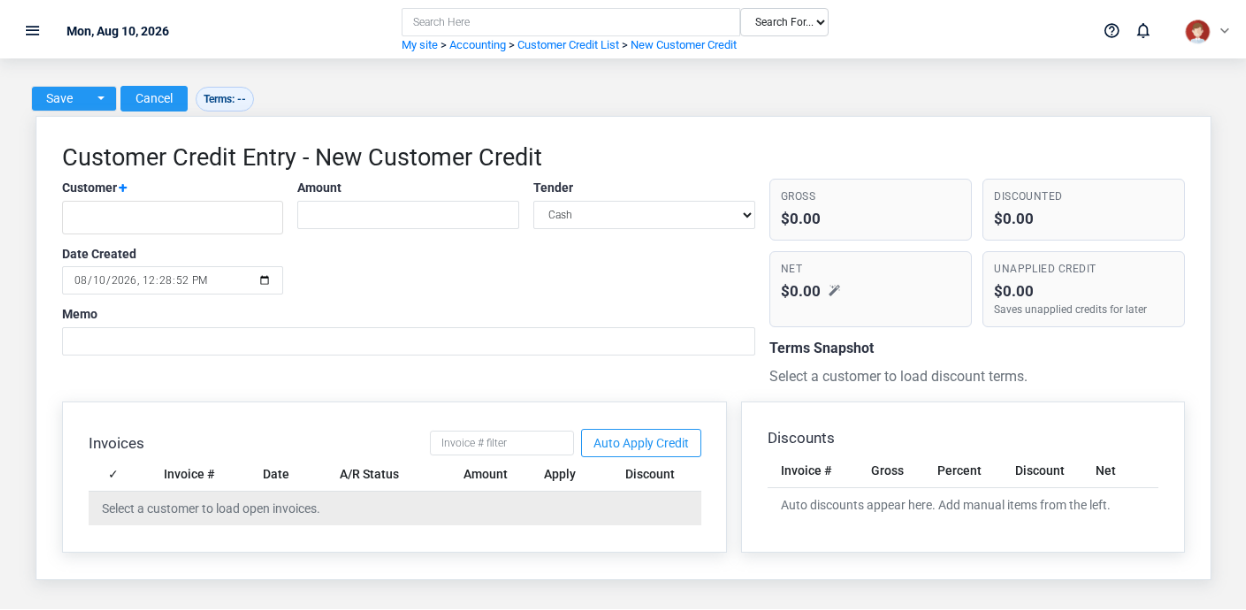
- **Identify it by: Date Created**, and **Check Number**.
- **Check its business context: Customer**, **Related Sale**, and **Relatedcredit**.
- **Why care:** Dates, accounts, amounts, posting state, and period locks can change financial reports. Verify them against the source document before finalizing the record.
- **Why care:** Treat posted, processed, paid, reversed, and edit-locked states as controls—not ordinary descriptive fields. Confirm the source transaction before changing any state that the screen permits you to change.

Before you begin

You need the Brisk permission for the action you are taking on customer credits. If a Create, Edit, or Delete control is absent, do not work around it with another user’s account; ask an administrator to review your role.

Have valid **Customer** records ready first. Those selections determine where this Customer Credit belongs and which later screens can find it.

Create a Customer Credit



The Customer Credits create screen in the Brisk documentation demo.

Create a Customer Credit only after confirming that the source document or operational event has not already been entered.

1. Select the business context first: **Customer**, **Related Sale**, and **Relatedcredit**.
2. Enter the required identifying and operational values: **Customer**, **Amount**, and **Tender**.
3. Review **Tender**, **Card Type**, **Posted**, and **Edit Locked** deliberately; these choices control availability or workflow rather than merely describing the record.
4. Save the Customer Credit, then confirm **Date Created**, and **Check Number** on its detail page before continuing.

After saving: Apply the credit during the customer’s next settlement or refund workflow, and verify the related sale and tender trail before closing the issue.

Delete a Customer Credit

Delete this Customer Credit only when it was entered by mistake and no downstream history depends on it. Use a reversal, void, credit, counter-adjustment, or status correction for a real event that later changed.

Before confirming, check for related **Customer Credits**, **Customer Debits**, **Deposits**, **Emv Refunds**, and **Emv Transactions**, plus the remaining screen fields. Brisk may refuse deletion when another record depends on this one; resolve the duplicate or use the supported correction workflow instead of breaking the trail.

On the confirmation page, verify **Date Created**, and **Check Number**. After confirmation, return to the Customer Credits list and make sure only the intended Customer Credit was removed.

Review Customer Credit details

Use the detail page as the shared record of what this Customer Credit currently means. Verify **Date Created**, **Amount**, **Tender**, **Card Type**, **Posted**, and **Edit Locked** before relying on it for a decision.

Follow **Customer**, **Related Sale**, and **Relatedcredit** to determine whether the issue is on this Customer Credit or on one of those linked records.

Next check: Apply the credit during the customer’s next settlement or refund workflow, and verify the related sale and tender trail before closing the issue.

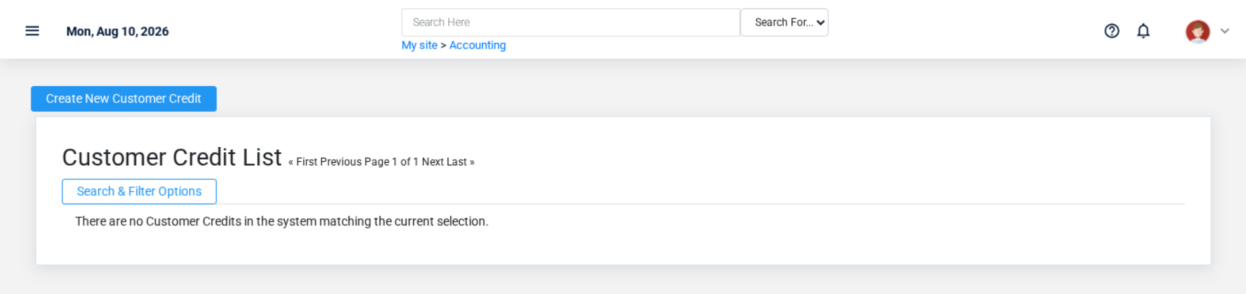
Edit an existing Customer Credit

Edit this Customer Credit to correct or complete the same source document or operational event; use the supported reversal or follow-up workflow when the business event itself changed.

1. Open the detail page. Compare **Customer**, **Related Sale**, and **Relatedcredit** with the supporting document or approved request.
2. Recheck **Date Created**, **Customer**, **Amount**, **Tender**, **Card Type**, and **Edit Locked**. These values are most likely to change account balances, financial periods, and statement results.
3. Save the change, return to the list, and confirm that the Customer Credit now appears under the expected **Tender**, **Card Type**, **Posted**, and **Edit Locked**.

After the change: Apply the credit during the customer’s next settlement or refund workflow, and verify the related sale and tender trail before closing the issue.

Find and review customer credits



The Customer Credits list screen in the Brisk documentation demo.

Use the Customer Credits list to find the correct record before opening or changing it. Compare **Date Created**, and **Check Number**. Records with similar names or numbers can still belong to different **Customer**, **Related Sale**, and **Relatedcredit**.

- Keyword search checks **Memo**, **Check Number**, and **Card Type**.
- Narrow the list with **Customer** filters.
- The date filter uses **Date Created**; choose a range that matches the business event you are reconciling.

Open the Customer Credit whose **Date Created**, and **Check Number** match the task. If it is missing, clear the list filters and recheck **Customer**, **Date Created**, **Tender**, **Card Type**, **Posted**, and **Edit Locked** rather than creating a replacement immediately.

Fields and business rules

Brisk stores 12 user-relevant fields for this Customer Credit, including 3 linked-record selections and 2 controlled-choice fields. Create and edit screens may hide calculated or workflow-managed values from this full reference.

Field	Required	What it controls
Date Created	No	Date and time recorded for date created on this customer credit.
Customer	Yes	Links this Customer Credit to the selected Customer; verify the relationship before saving.
Amount	Yes	The amount value recorded for this customer credit.
Tender	Yes	If receiving a payment, select the payment method used by the customer. If crediting an account to reverse a finance charge, select "Interest Reversal". If writing off a bad debt, select "Write-Off". Available values: Cash, Check, ACH, Debit Card, Credit Card, Refund, User Defined, Discount.

Field	Required	What it controls
Check Number	No	The check number recorded for this customer credit.
Card Type	No	The card type recorded for this customer credit. Available values: Visa, Master Card, Discover, American Express.
Memo	No	The memo recorded for this customer credit.
Related Sale	No	The related sale associated with this customer credit.
Relatedcredit	No	The related credit associated with this customer credit.
Posted	No	Whether the posted option applies to this customer credit.
Edit Locked	No	Whether the edit locked option applies to this customer credit.
Pos Client Request Id	No	Idempotency key supplied by the Point of Sale client for online and offline account payment submissions.

What happens next

Apply the credit during the customer’s next settlement or refund workflow, and verify the related sale and tender trail before closing the issue.

Common mistakes and troubleshooting

- **The record will not save:** Recheck **Customer**, **Amount**, and **Tender** and any message beside the field. A required related record may also be inactive or unavailable to your role.
- **The record saved but is not available where expected:** Recheck **Tender**, **Card Type**, **Posted**, and **Edit Locked**, then clear the filters on the destination list. A saved record can still be inactive, unpublished, locked, unapproved, or in the wrong workflow state.
- **The values look right but the result is wrong:** Open **Customer**, **Related Sale**, and **Relatedcredit** from the detail page. Correct the specific relationship that is wrong instead of forcing a total or status to compensate for it.

Revision #3
Created 2026-08-10 16:07:10 UTC by Brisk
Updated 2026-08-10 20:23:39 UTC by Brisk