

Customer Order to Cash

This workflow follows a named customer order from entry through fulfillment, payment or receivable status, inventory activity, and financial review. The original request, customer PO, item rows, and downstream records remain traceable, so the next employee can continue from saved work instead of rebuilding it.

“ **Demonstration notice:** All names, identifiers, amounts, contact information, and transactions shown here are fictional and exist only in the Brisk documentation environment. Payment examples use saved test states and do not contact a processor.

Workflow at a glance

Outcome	A fulfilled sale with a supported payment or receivable state and reviewable downstream history
Starts with	A verified customer request
Ends with	Sale, fulfillment, inventory, payment or receivable, and reporting review
Primary roles	Salesperson, fulfillment clerk, cashier, accounts-receivable clerk
Brisk areas involved	Customers, Sales, Inventory, Accounting, Payments
Common businesses	Parts, equipment, feed-and-supply, wholesale, general business
Approximate handoffs	Three

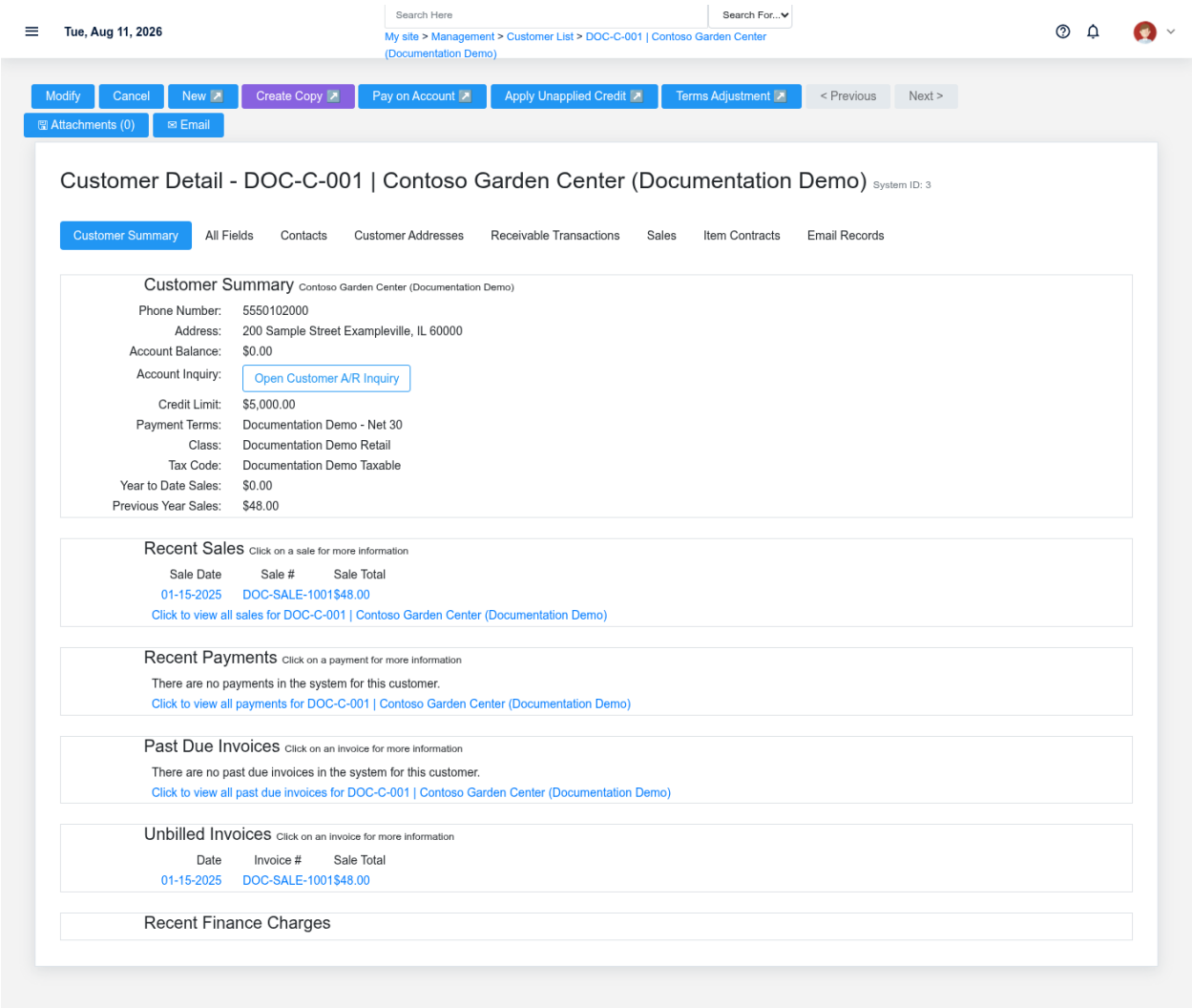
Why this workflow matters

A customer order carries more than a total. Staff need the requested items, customer PO, warehouse, price and tax decisions, delivery expectation, and payment terms. When those facts stay on the sale, fulfillment and accounting can work from the same source.

The statuses also prevent a common shortcut: treating an entered order as shipped or an initiated payment as collected. Brisk keeps fulfillment and payment status separately, allowing each team

to verify its own part.

Before you begin



Confirm the customer record before relying on its terms, pricing, tax, or credit context.

- Required: customer, active warehouse, saleable items and units, tax setup, and permission to create and update sales.
- Required for on-account work: valid payment terms and an authorized credit decision.
- Optional: price class, customer PO, fulfillment method, email receipt, or sandbox payment provider.
- Confirm stock separately. The draft documentation sale does not reserve or consume inventory.

End-to-end steps

2. **Salesperson — build the order.** In [Point of Sale](#) or the supported sale form, select the customer and warehouse. Add each item, quantity, unit, price, authorized discount, tax treatment, and customer PO. DOC-SALE-1001 contains two stocked cartridges and remains Draft.
3. **Salesperson — review the intended outcome.** Confirm totals, fulfillment requirement, requested method, and payment path. Finalize once through the action appropriate to the tender or on-account sale. Do not call a Draft sale a quote; Brisk has a separate [Quote](#) record.
4. **Fulfillment clerk — act on the saved sale.** Use the sale's fulfillment records and status. Verify the picked quantity and delivery, shipping, or pickup evidence before marking work complete. Inventory is consumed by processed sale fulfillment for qualifying item rows, not by merely opening a cart.
5. **Cashier or receivables clerk — record value received.** Record a supported tender or leave the finalized sale in Receivable status under authorized terms. A processor launch, URL, or authorization is not settlement.
6. **Manager — verify the chain.** Review the completed [Sale](#), fulfillment history, item history, customer history, payment application, and [Receivable Transactions](#) when the sale is on account.

What Brisk keeps connected

The screenshot shows the 'Inventory History' form. At the top, there is a search bar with 'Search Here' and a 'Search For...' dropdown. Below this is a breadcrumb 'My site > Inventory History'. The main form area has a title 'Inventory History' and four input fields: 'Item' (with a search prompt 'Search item name, code, barcode, or vendor item #'), 'Warehouse' (with a dropdown arrow), 'Start Date' (with the value '08/01/2026'), and 'End Date' (with the value '08/11/2026'). A blue 'Run' button is to the right of the date fields. Below these fields is a 'Show' section with four checked checkboxes: 'Purchased', 'Received', 'Sold', and 'Manufactured'. At the bottom of the form is a purple box with the text 'Select an item and date range to run the report.'

Inventory history is the place to verify posted item movement; draft order entry alone does not prove movement.

Sale List « First Previous Page 1 of 1 Next Last »

Search Here				
Sale	Customer	Total	Payment Status	Created At
DOC-SALE-1001	DOC-C-001 Contoso Garden Center (Documentation Demo)	\$48.00	Draft	01/15/2025 03:00 PM
Pay Save Options x				
Pay Save Options				

The saved sale remains available for operational follow-up rather than being reconstructed from the payment.

Action	Result or downstream record	Where to verify it
Select customer and enter rows	Customer, PO reference, warehouse, items, pricing, tax, and totals remain on the sale	Sale detail
Complete supported fulfillment	Fulfillment status and processed item movement	Sale fulfillment and item inventory history
Finalize as Receivable	Customer obligation and due-date context	Receivable inquiry and customer history
Record payment	Tender/application history; processor state remains separate when used	Sale payment history and provider record

Handoffs and controls

Search Here

Search For...

My site > Customer A/R Inquiry

Review a customer's open invoices, finance charges, payments, credits, and receivable history.

Customer

Inquiry View

Begin Date

End Date

Aging Date

Invoice / Reference

Open Invoices

MM/DD/YYYY

MM/DD/YYYY

08/11/2026

Invoice, check, memo...

☒ Show Customer Payments

Balances and aging always include posted payments.

Load Inquiry

Clear

Select a customer to load their receivable inquiry.

When a finalized sale is placed on account, accounting verifies the resulting obligation from receivable history.

Sales hands the saved sale to fulfillment; fulfillment hands verified completion to accounting or payment staff. Draft, Submitted, Complete, Paid, and Receivable are business controls, not decorative labels. The sale remains the source for customer and line detail, while its fulfillment and payment records are the evidence for those later events.

Exceptions and safe corrections

- Wrong customer or line on a draft: correct the same sale before finalization.
- Short stock or partial delivery: record only the quantity actually fulfilled and leave the remainder visibly outstanding when the configured path supports it.
- Uncertain payment response: check both the saved sale and provider history before retrying.
- Completed error: use the supported return, void, credit, or linked correction. Do not create an unrelated opposite sale.
- Missing permission or setup: stop at the current state and have the responsible administrator correct access or configuration.

Related documentation

Start here

- [Customers](#)
- [Point of Sale](#)

Continue with

- [Sales](#)
- [Inventory Items](#)
- [Receivable Transactions](#)

Related controls and reports

- [Offline POS Queue](#)
- [Receivables, Statements, and Finance Charges](#)

Could Brisk Simplify This Process for Your Team?

See how this workflow could be configured around your records, permissions, approvals, and reporting requirements.

[Request a focused Brisk demonstration](#)

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