

Online Order to Fulfillment

This workflow follows a customer-facing storefront order into Brisk’s back-office order, payment review, fulfillment work, inventory history, and reporting. Checkout crosses a deliberate application boundary, but staff continue from the created Sale and Ecommerce Order without re-entering the customer’s lines and fulfillment choice.

“ **Demonstration notice:** All storefront and back-office data is fictional. Payment completion, email, webhooks, and carrier actions are simulated or suppressed; no live charge, message, or shipping label is created.

Workflow at a glance

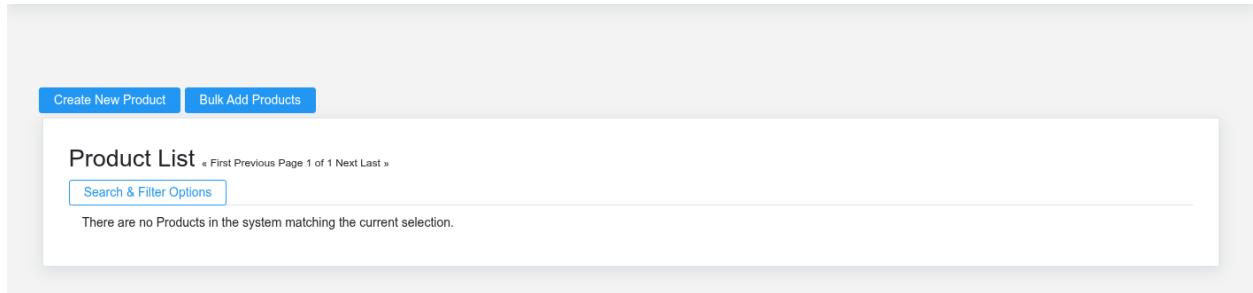
Outcome	A paid-or-reviewed online order completed through its configured fulfillment path
Starts with	A published product listing in an active storefront
Ends with	Fulfillment state, item history, customer history, and order reporting
Primary roles	Shopper, ecommerce clerk, fulfillment clerk, payment reviewer
Brisk areas involved	Storefront, Ecommerce, Sales, Inventory, Payments
Common businesses	Retail, parts, equipment, feed-and-supply
Approximate handoffs	Three

Why this workflow matters

An online channel creates extra reconciliation work when its products, orders, payment states, and fulfillment records live apart from the operating system. Brisk’s storefront services create a Sale and Ecommerce Order together so back-office staff receive the saved customer and order context.

That connection does not erase the payment-provider boundary. Staff still verify whether payment is pending or paid and whether fulfillment is submitted, pending, fulfilled, or complete.

Before you begin

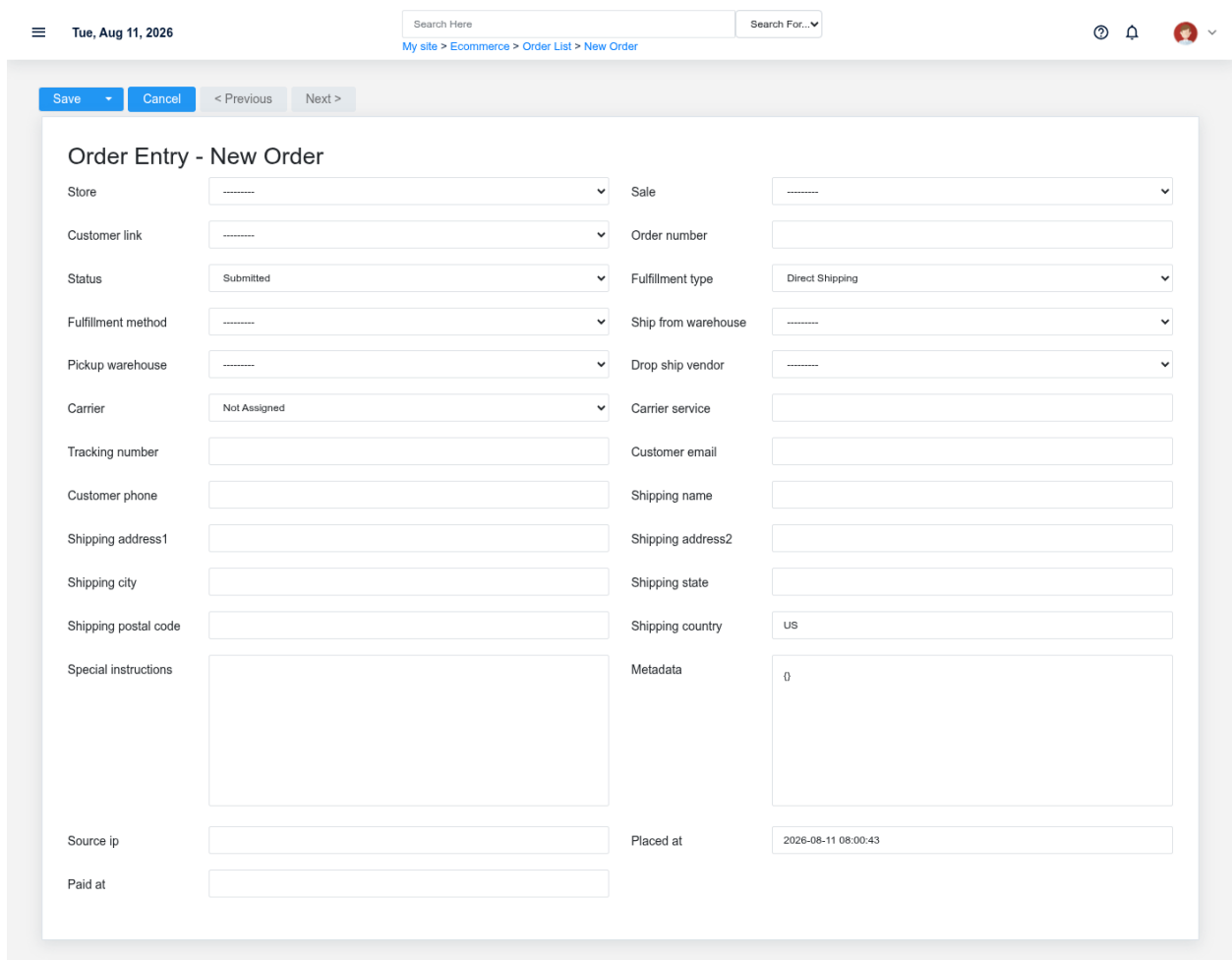


The screenshot shows a web interface for a product list. At the top, there are two buttons: "Create New Product" and "Bulk Add Products". Below them is a header "Product List" with a breadcrumb trail: « First Previous Page 1 of 1 Next Last ». A search bar with the text "Search & Filter Options" is present. Below the search bar, a message states: "There are no Products in the system matching the current selection."

Only published, correctly priced product listings should enter the customer-facing catalog.

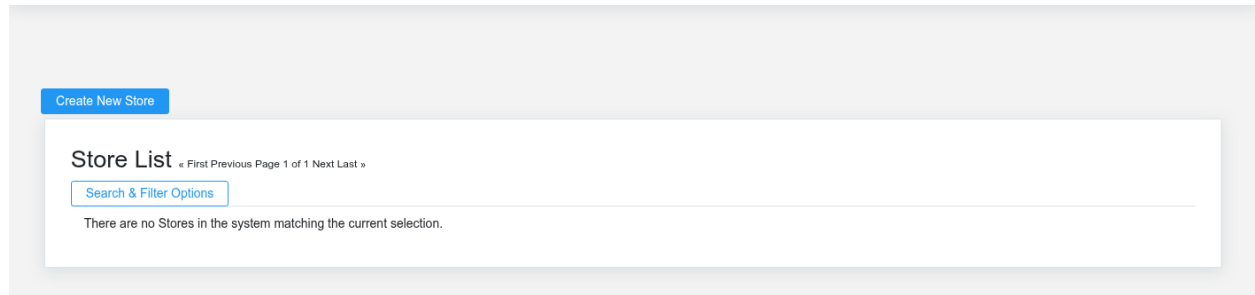
- Required: active Ecommerce Store, published product listings, customer/tax behavior, ship-from or pickup warehouse, and supported fulfillment configuration.
- Required: checkout mode and a safe payment configuration.
- Optional: customer link, shipping provider, carrier/service, or pickup instructions.
- Inventory is not consumed when an item enters a browser cart. For this path, qualifying inventory movement follows processed Sale fulfillment.

End-to-end steps



The screenshot shows a web interface for a new order entry. The top navigation bar includes a hamburger menu, the date "Tue, Aug 11, 2026", a search bar with "Search Here" and "Search For..." buttons, and a user profile icon. Below the navigation bar is a breadcrumb trail: "My site > Ecommerce > Order List > New Order". The main form is titled "Order Entry - New Order" and contains various input fields and dropdown menus. The form is organized into two columns. The left column includes fields for Store, Customer link, Status (Submitted), Fulfillment method, Pickup warehouse, Carrier (Not Assigned), Tracking number, Customer phone, Shipping address1, Shipping city, Shipping postal code, Special instructions, Source ip, and Paid at. The right column includes fields for Sale, Order number, Fulfillment type (Direct Shipping), Ship from warehouse, Drop ship vendor, Carrier service, Customer email, Shipping name, Shipping address2, Shipping state, Shipping country (US), Metadata, and Placed at (2026-08-11 08:00:43). The form also has a "Save" button and a "Cancel" button at the top left.

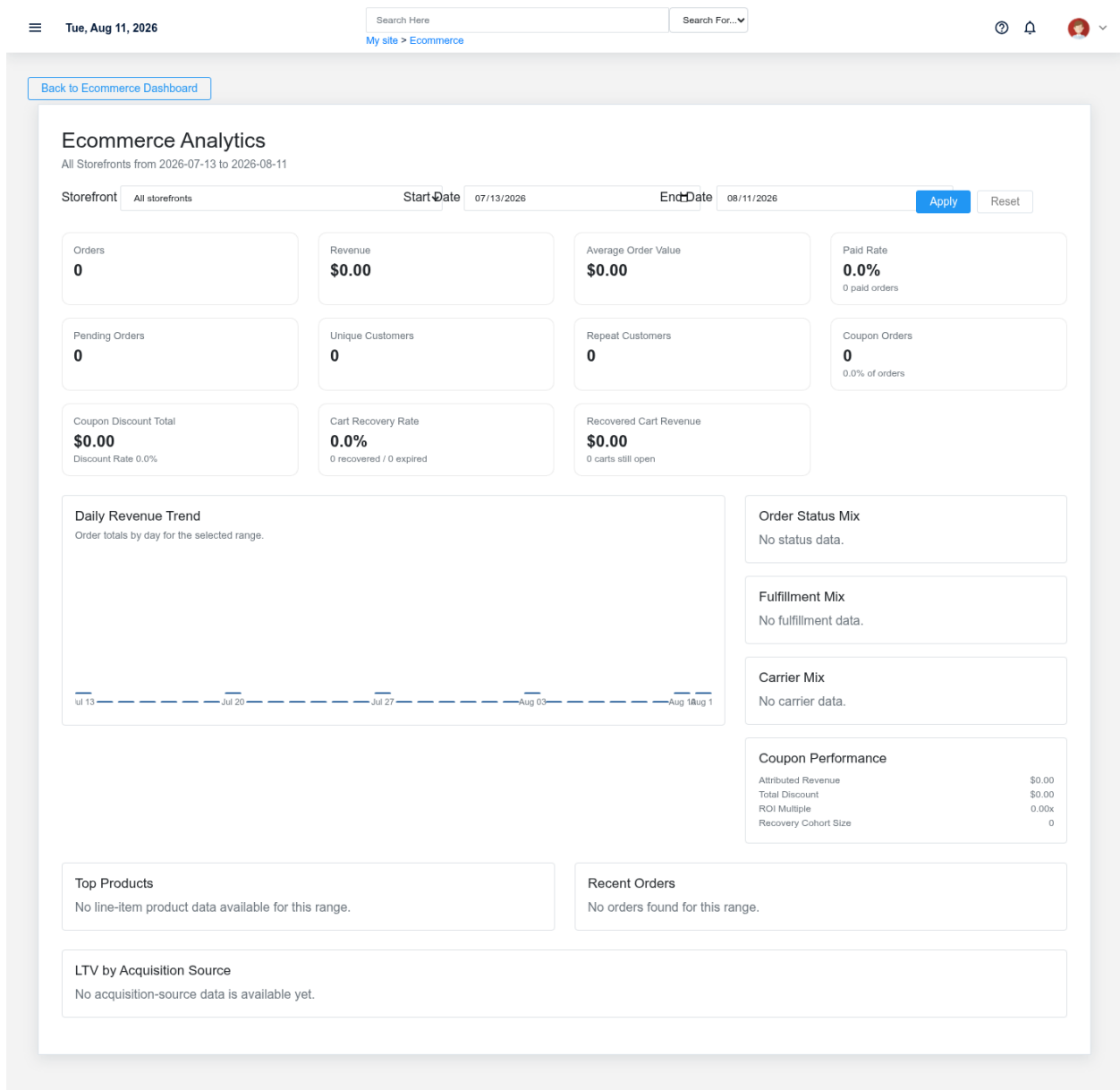
Checkout creates a Brisk sale and ecommerce order; staff work from the back-office order rather than re-keying it.



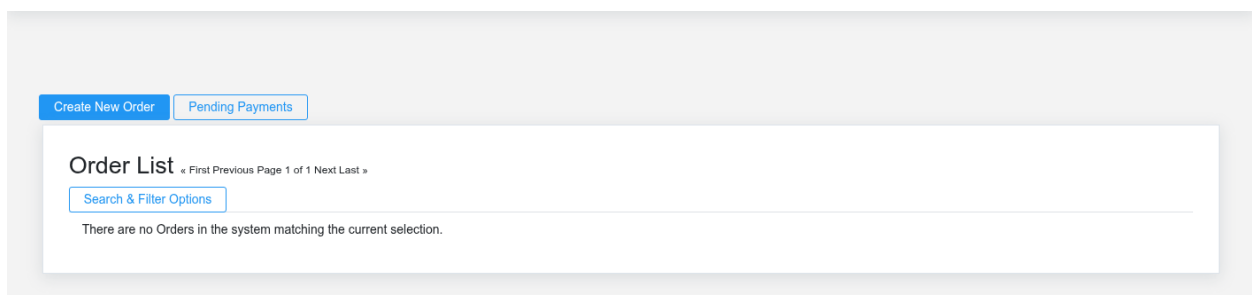
Store setup defines the storefront boundary, fulfillment choices, and checkout configuration.

1. **Merchandising staff — verify the storefront record.** Review [Ecommerce Product Listings](#), price, publication state, item link, and availability presentation.
2. **Shopper — build and submit checkout.** Add the fictional stocked products, select one configured fulfillment method, provide fictional contact/address data, review totals, and submit once.
3. **Brisk storefront — create the back-office records.** Checkout creates a Draft Sale plus an [Ecommerce Order](#). The order holds storefront, sale, order number, customer contact, fulfillment choice, and placed time.
4. **Payment reviewer — confirm payment state.** A manual unpaid order can move to Payment Pending. Verified successful reconciliation marks the Sale Paid and moves required fulfillment from Draft to Submitted; staff must not infer success from a redirect alone.
5. **Fulfillment clerk — prepare the supported method.** Work from the order and linked Sale. Pick and verify the actual quantity, then record shipping, delivery, or pickup progress using the configured path. This example does not create a carrier label.
6. **Fulfillment clerk and manager — complete and verify.** Mark fulfillment only when the real handoff occurred. Review the Order, Sale, item history, customer history, payment event, and ecommerce reporting.

What Brisk keeps connected



Channel reporting reads the stored orders and states after operational work is recorded.



Payment Pending is a control state, not evidence that a processor completed the payment.

Action	Result or downstream record	Where to verify it
Submit checkout	Linked Sale and Ecommerce Order	Order detail and linked Sale
Reconcile verified payment	Paid Sale and fulfillment-pending order state	Payment Events, Order, and Sale

Action	Result or downstream record	Where to verify it
Process fulfillment	Fulfillment status and qualifying inventory movement	Order, Sale fulfillment, item history
Complete order	Saved channel history and reporting input	Ecommerce analytics and customer history

Handoffs and controls

Search Here

Search For...

[My site > Inventory History](#)

Inventory History

Item

Warehouse

Start Date

End Date

Search item name, code, barcode, or vendor item #

.....

08/01/2026

08/11/2026

Run

Show

☒ Purchased

☒ Received

☒ Sold

☒ Manufactured

Select an item and date range to run the report.

Verify inventory movement after the sale fulfillment is processed, not when a shopper merely adds a cart line.

The shopper submits the request; the storefront persists it; payment staff verify external results; fulfillment staff act on the saved order. The Ecommerce Order is the channel record and its linked Sale carries commercial lines and accounting/inventory behavior. Status must reflect evidence, not staff expectation.

Exceptions and safe corrections

- Incorrect address or fulfillment method: correct the same order before shipment and document the approved change.
- Payment Pending or failed: review Payment Events and provider state before releasing goods or retrying.
- Duplicate checkout uncertainty: search by order number, customer, and Sale before resubmission.
- Stock shortfall: leave the unfulfilled quantity visible and contact the customer through approved channels.
- Missing warehouse/provider setup: stop; do not invent a tracking number or force a paid status.

Related documentation

Start here

- [Ecommerce Stores](#)
- [Ecommerce Product Listings](#)

Continue with

- [Ecommerce Orders](#)
- [Sales](#)
- [Ecommerce Payment Events](#)

Related controls and reports

- [Inventory Items](#)
- [Ecommerce](#)

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](#)

Revision #2

Created 2026-08-11 13:17:27 UTC by Brisk

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