Customers

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Purpose and when to use this record

Connect an online shopper identity to the corresponding Brisk customer used for orders and account history.

At a glance

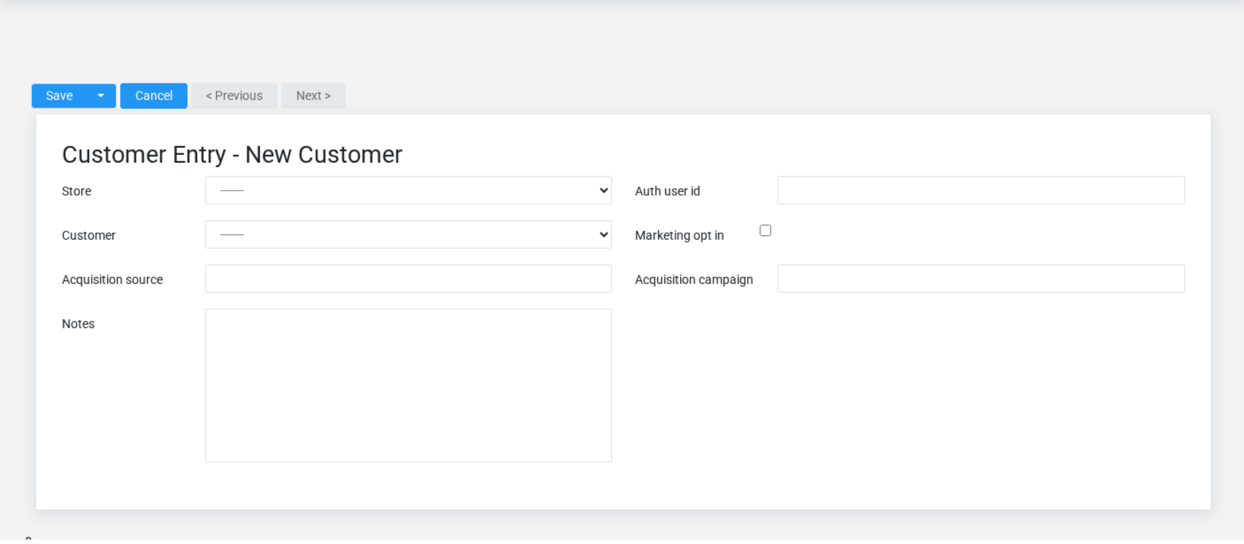
- **Identify it by: Invite Status**.
- **Check its business context: Store**, and **Customer**.
- **Why care:** Store, publication, consent, payment, and fulfillment states affect what customers see and what staff must act on; check the correct store before saving.

Before you begin

You need the Brisk permission for the action you are taking on customers. 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 **Store**, and **Customer** records ready first. Those selections determine where this Customer belongs and which later screens can find it.

Create a Customer



The Customers create screen in the Brisk documentation demo.

Create a Customer only when the existing choices do not represent the policy or classification you need. Near-duplicate setup values split reporting and make later selection harder.

1. Select the business context first: **Store**, and **Customer**.
2. Enter the required identifying and operational values: **Store**, and **Customer**.
3. Review **Marketing Opt In**, and **Invite Status** deliberately; these choices control availability or workflow rather than merely describing the record.
4. Save the Customer, then confirm **Invite Status** on its detail page before continuing.

After saving: Open **Abandoned Carts**, **Campaign Deliveries**, **Mailing Subscribers**, and **Orders** and confirm the Customer appears with the intended label and availability. Keep the old value for historical records when changing it would split or relabel prior reporting.

Review Customer details

Use the detail page as the shared record of what this Customer currently means. Verify **Invite Status** before relying on it for a decision.

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

Next check: Open **Abandoned Carts**, **Campaign Deliveries**, **Mailing Subscribers**, and **Orders** and confirm the Customer appears with the intended label and availability. Keep the old value for historical records when changing it would split or relabel prior reporting.

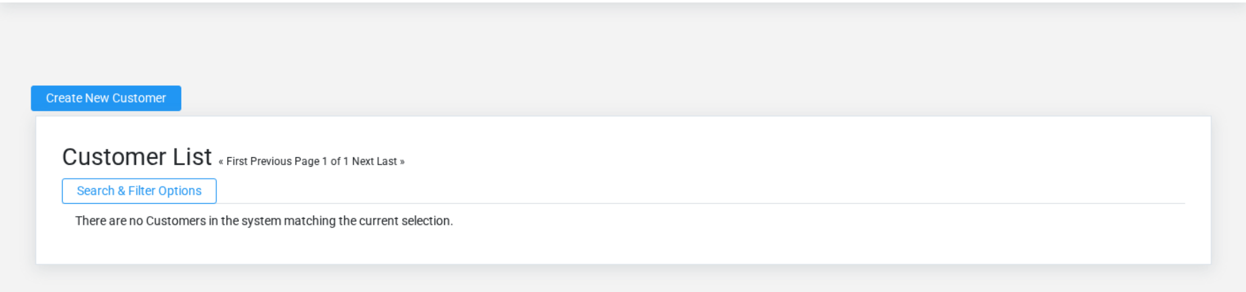
Edit an existing Customer

Edit this Customer when the underlying policy or classification changed. First determine whether historical transactions should retain the old value; if so, deactivate the old choice and create a new one.

1. Open the detail page. Compare **Store**, and **Customer** with the supporting document or approved request.
2. Recheck **Customer**, and **Invite Status**. These values are most likely to change storefront visibility, customer communication, payment, or fulfillment.
3. Save the change, return to the list, and confirm that the Customer now appears under the expected **Invite Status**.

After the change: Open **Abandoned Carts**, **Campaign Deliveries**, **Mailing Subscribers**, and **Orders** and confirm the Customer appears with the intended label and availability. Keep the old value for historical records when changing it would split or relabel prior reporting.

Find and review customers



The Customers list screen in the Brisk documentation demo.

Use the Customers list to find the correct record before opening or changing it. Compare **Invite Status**. Records with similar names or numbers can still belong to different **Store**, and **Customer**.

- Keyword search checks **Display Name**, **Email**, **Auth User Id**, **Invite Status**, and **Invite Email**.
- Narrow the list with **Store**, and **Customer** filters.
- The initial order emphasizes **Name**, and **Display Name**. Select a column heading when you need a different comparison.

Open the Customer whose **Invite Status** match the task. If it is missing, clear the list filters and recheck **Store**, **Customer**, and **Invite Status** rather than creating a replacement immediately.

Fields and business rules

Brisk stores 15 user-relevant fields for this Customer, including 2 linked-record selections and 1 controlled-choice field. Create and edit screens may hide calculated or workflow-managed values from this full reference.

Field	Required	What it controls
Store	Yes	The store associated with this customer link.
Auth User Id	No	The auth user ID value recorded for this customer link.
Customer	Yes	The customer associated with this customer link.
Marketing Opt In	No	Whether the marketing opt in option applies to this customer link.
Acquisition Source	No	The acquisition source recorded for this customer link.
Acquisition Campaign	No	The acquisition campaign recorded for this customer link.
Invite Status	No	The invite status recorded for this customer link. Available values: Not Invited, Invitation Sent, Invitation Accepted, Invitation Expired, Invitation Failed.
Invite Email	No	Email address recorded as invite email for this customer link.
Invite Token	No	The invite token recorded for this customer link.
Invite Token Expires At	No	Date and time recorded for invite token expires at on this customer link.
Invite Last Sent At	No	Date and time recorded for invite last sent at on this customer link.
Invite Accepted At	No	Date and time recorded for invite accepted at on this customer link.
Invite Send Count	No	The invite send count value recorded for this customer link.
Invite Last Error	No	The invite last error recorded for this customer link.
Notes	No	Additional internal notes about this customer link.

What happens next

Open **Abandoned Carts**, **Campaign Deliveries**, **Mailing Subscribers**, and **Orders** and confirm the Customer appears with the intended label and availability. Keep the old value for historical records when changing it would split or relabel prior reporting.

Common mistakes and troubleshooting

- **The record will not save:** Recheck **Store**, and **Customer** and any message beside the field. A required related record may also be inactive or unavailable to your role.
- **The values look right but the result is wrong:** Open **Store**, and **Customer** from the detail page. Correct the specific relationship that is wrong instead of forcing a total or status to compensate for it.

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