

Discount Codes

Discount Codes

Purpose and when to use this record

Configure a storefront promotion's code, eligibility, date window, usage limits, and discount calculation.

At a glance

- **Identify it by:** **Name**, and **Code**.
- **Check its business context:** **Store**.
- **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.
- **Why care:** Availability and publication flags affect future use without erasing history. Prefer disabling an obsolete setup record when existing transactions still refer to it.

Before you begin

You need the Brisk permission for the action you are taking on discount codes. 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** records ready first. Those selections determine where this Discount Code belongs and which later screens can find it.

Create a Discount Code

The Discount Codes create screen in the Brisk documentation demo.

Create a Discount Code 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**.
2. Enter the required identifying and operational values: **Store**, **Name**, and **Code**.
3. Review **Is Active**, **Auto Apply**, and **Discount Type** deliberately; these choices control availability or workflow rather than merely describing the record.
4. Save the Discount Code, then confirm **Name**, and **Code** on its detail page before continuing.

After saving: Open **Abandoned Carts**, and **Discount Redemptions** and confirm the Discount Code appears with the intended label and availability. Keep the old value for historical records when changing it would split or relabel prior reporting.

Delete a Discount Code

Delete this Discount Code only if it is an unused duplicate or setup mistake. Once other records refer to it, preserve that history and make the value inactive when the screen provides that option.

If the record is merely obsolete, use **Is Active** to remove it from future use while preserving existing references.

Before confirming, check for related **Abandoned Carts**, and **Discount Redemptions**. 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 **Name**, and **Code**. After confirmation, return to the Discount Codes list and make sure only the intended Discount Code was removed.

Review Discount Code details

Use the detail page as the shared record of what this Discount Code currently means. Verify **Is Active**, **Discount Type**, **Amount**, and **Minimum Subtotal** before relying on it for a decision.

Follow **Store** to determine whether the issue is on this Discount Code or on one of those linked records.

Next check: Open **Abandoned Carts**, and **Discount Redemptions** and confirm the Discount Code appears with the intended label and availability. Keep the old value for historical records when changing it would split or relabel prior reporting.

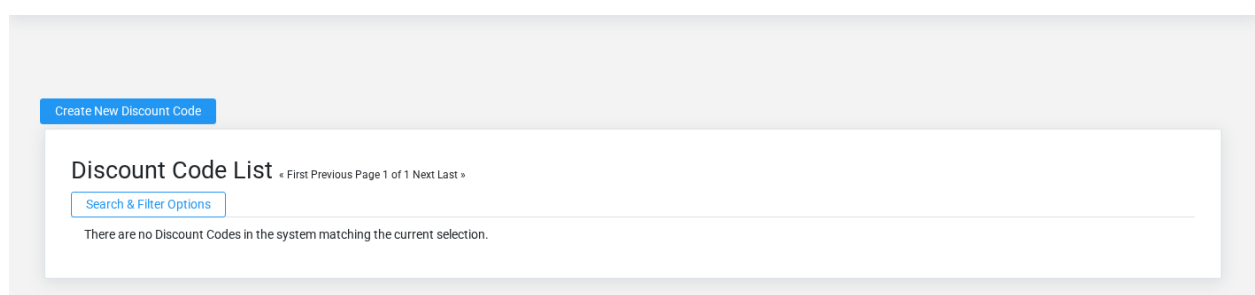
Edit an existing Discount Code

Edit this Discount Code 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** with the supporting document or approved request.
2. Recheck **Is Active**, **Discount Type**, **Amount**, **Minimum Subtotal**, **Usage Limit Per Customer**, and **Customer Email Allowlist**. 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 Discount Code now appears under the expected **Is Active**, and **Discount Type**.

After the change: Open **Abandoned Carts**, and **Discount Redemptions** and confirm the Discount Code 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 discount codes



The Discount Codes list screen in the Brisk documentation demo.

Use the Discount Codes list to find the correct record before opening or changing it. Compare **Name**, and **Code**. Records with similar names or numbers can still belong to different **Store**.

- Keyword search checks **Code**, **Name**, and **Description**.
- Narrow the list with **Store** filters.
- The initial order emphasizes **Name**, and **Code**. Select a column heading when you need a different comparison.

Open the Discount Code whose **Name**, and **Code** match the task. If it is missing, clear the list filters and recheck **Store**, **Is Active**, and **Discount Type** rather than creating a replacement immediately.

Fields and business rules

Brisk stores 17 user-relevant fields for this Discount Code, including 1 linked-record selection 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 discount code.
Name	Yes	Human-readable name for this discount code.
Code	Yes	Short code used to identify this discount code.
Description	No	Description of this discount code.
Is Active	No	Whether this discount code is active.
Auto Apply	No	Automatically applies when eligible and no other code is set.
Priority	No	The priority value recorded for this discount code.
Discount Type	No	The discount type recorded for this discount code. Available values: Percentage Off, Fixed Amount Off, Free Shipping.
Amount	No	The amount value recorded for this discount code.
Minimum Subtotal	No	The minimum subtotal value recorded for this discount code.
Maximum Discount	No	The maximum discount value recorded for this discount code.

Field	Required	What it controls
Starts At	No	Date and time recorded for starts at on this discount code.
Ends At	No	Date and time recorded for ends at on this discount code.
Usage Limit	No	The usage limit value recorded for this discount code.
Usage Limit Per Customer	No	The usage limit per customer value recorded for this discount code.
Customer Email Allowlist	No	Optional newline/comma-separated emails allowed to use this code.
Times Redeemed	No	The times redeemed value recorded for this discount code.

What happens next

Open **Abandoned Carts**, and **Discount Redemptions** and confirm the Discount Code 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**, **Name**, and **Code** 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 **Is Active**, and **Discount Type**, 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 **Store** 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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