

Mailing Lists

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Purpose and when to use this record

Maintain a store's opt-in audience list and the subscribers eligible for campaign delivery.

At a glance

- **Identify it by: Name.**
- **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 mailing lists. 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 Mailing List belongs and which later screens can find it.

Create a Mailing List

The Mailing Lists create screen in the Brisk documentation demo.

Create a Mailing List after searching for the person, organization, item, location, or resource under alternate names and identifiers. Merge or correct an existing master record instead of creating a duplicate.

1. Select the business context first: **Store**.
2. Enter the required identifying and operational values: **Store**, and **Name**.
3. Review **Is Active**, **Is Default**, and **Require Double Opt In** deliberately; these choices control availability or workflow rather than merely describing the record.
4. Save the Mailing List, then confirm **Name** on its detail page before continuing.

After saving: Verify this Mailing List in **Mailing Subscribers** before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

Delete a Mailing List

Delete this Mailing List 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 **Mailing Subscribers**. 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**. After confirmation, return to the Mailing Lists list and make sure only the intended Mailing List was removed.

Review Mailing List details

Use the detail page as the shared record of what this Mailing List currently means. Verify **Is Active** before relying on it for a decision.

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

Next check: Verify this Mailing List in **Mailing Subscribers** before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

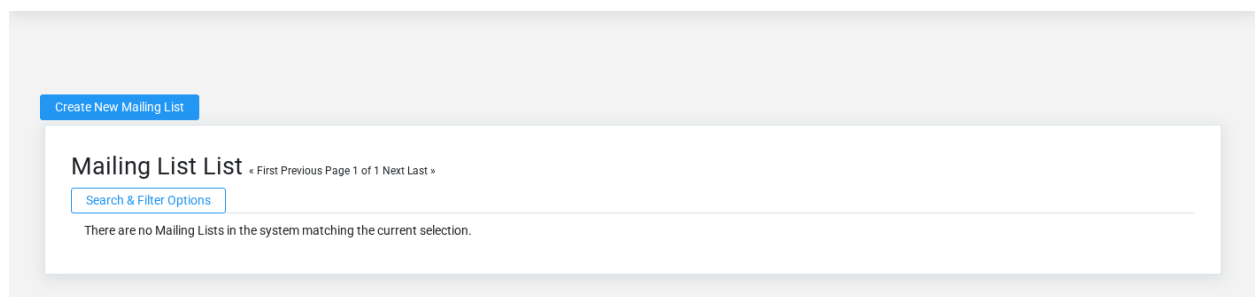
Edit an existing Mailing List

Edit this Mailing List to keep the same real-world party, item, location, or resource accurate. Do not repurpose it for a different entity after activity is attached.

1. Open the detail page. Compare **Store** with the supporting document or approved request.
2. Recheck **Is Active**. 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 Mailing List now appears under the expected **Is Active**.

After the change: Verify this Mailing List in **Mailing Subscribers** before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

Find and review mailing lists



The Mailing Lists list screen in the Brisk documentation demo.

Use the Mailing Lists list to find the correct record before opening or changing it. Compare **Name**. Records with similar names or numbers can still belong to different **Store**.

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

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

Fields and business rules

Brisk stores 7 user-relevant fields for this Mailing List, including 1 linked-record selection and 0 controlled-choice fields. 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 mailing list.
Name	Yes	Human-readable name for this mailing list.
Slug	No	URL-safe identifier for this mailing list.
Description	No	Description of this mailing list.
Is Active	No	Whether this mailing list is active.
Is Default	No	Whether this mailing list is default.
Require Double Opt In	No	Whether the require double opt in option applies to this mailing list.

What happens next

Verify this Mailing List in **Mailing Subscribers** before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

Common mistakes and troubleshooting

- **The record will not save:** Recheck **Store**, and **Name** 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**, 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.