Mailing Subscribers

Mailing Subscribers

Purpose and when to use this record

Maintain an email address’s subscription and consent state for a specific storefront mailing list.

At a glance

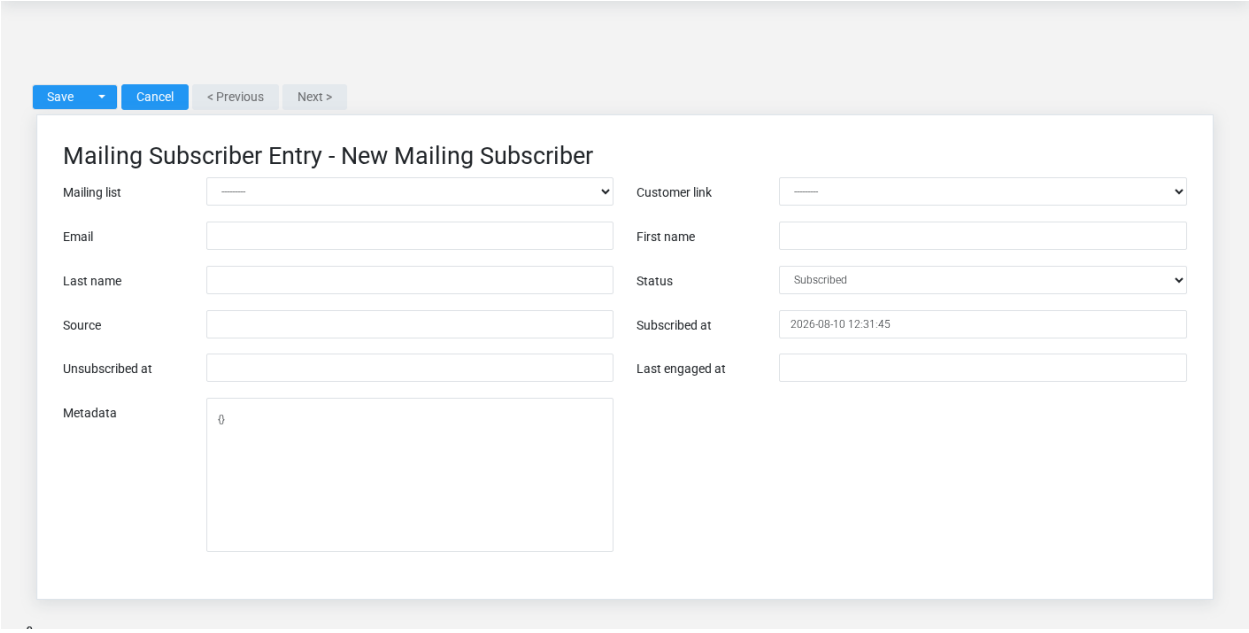
- **Identify it by: First Name**, **Last Name**, and **Status**.
- **Check its business context: Mailing List**, and **Customer Link**.
- **Why care:** Store, publication, consent, payment, and fulfillment states affect what customers see and what staff must act on; check the correct store before saving.
- **Why care:** Status communicates workflow progress to other staff. Change it only when the underlying work, approval, payment, or handoff has actually occurred.

Before you begin

You need the Brisk permission for the action you are taking on mailing subscribers. 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 **Mailing List** records ready first. Those selections determine where this Mailing Subscriber belongs and which later screens can find it.

Create a Mailing Subscriber



The Mailing Subscribers create screen in the Brisk documentation demo.

Create a Mailing Subscriber 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: **Mailing List**, and **Customer Link**.
2. Enter the required identifying and operational values: **Mailing List**, and **Email**.
3. Review **Status** deliberately; these choices control availability or workflow rather than merely describing the record.
4. Save the Mailing Subscriber, then confirm **First Name**, **Last Name**, and **Status** on its detail page before continuing.

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

Delete a Mailing Subscriber

Delete this Mailing Subscriber 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.

Before confirming, check for related **Campaign Deliveries**. 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 **First Name**, **Last Name**, and **Status**. After confirmation, return to the Mailing Subscribers list and make sure only the intended Mailing Subscriber was removed.

Review Mailing Subscriber details

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

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

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

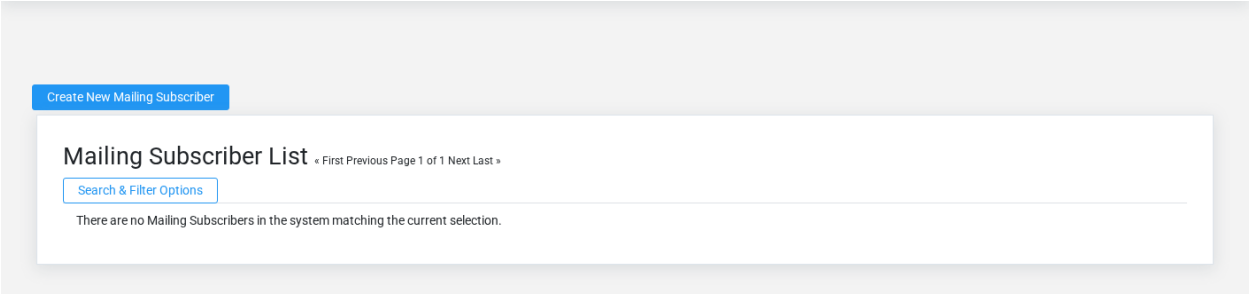
Edit an existing Mailing Subscriber

Edit this Mailing Subscriber 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 **Mailing List**, and **Customer Link** with the supporting document or approved request.
2. Recheck **Customer Link**, and **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 Mailing Subscriber now appears under the expected **Status**.

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

Find and review mailing subscribers



The Mailing Subscribers list screen in the Brisk documentation demo.

Use the Mailing Subscribers list to find the correct record before opening or changing it. Compare **First Name**, **Last Name**, and **Status**. Records with similar names or numbers can still belong to different **Mailing List**, and **Customer Link**.

- Keyword search checks **Email**, **First Name**, **Last Name**, and **Source**.
- Narrow the list with **Mailing List**, and **Customer Link** filters.
- The date filter uses **Subscribed At**; choose a range that matches the business event you are reconciling.
- The initial order emphasizes **Name**, and **Email**. Select a column heading when you need a different comparison.

Open the Mailing Subscriber whose **First Name**, **Last Name**, and **Status** match the task. If it is missing, clear the list filters and recheck **Mailing List**, **Customer Link**, **Subscribed At**, and **Status** rather than creating a replacement immediately.

Fields and business rules

Brisk stores 10 user-relevant fields for this Mailing Subscriber, 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
Mailing List	Yes	The mailing list associated with this mailing list subscriber.
Customer Link	No	The customer link associated with this mailing list subscriber.
Email	Yes	Email address recorded as email for this mailing list subscriber.
First Name	No	The first name recorded for this mailing list subscriber.
Last Name	No	The last name recorded for this mailing list subscriber.
Status	No	Current status of this mailing list subscriber. Available values: Subscribed, Pending Confirmation, Unsubscribed, Bounced.
Source	No	The source recorded for this mailing list subscriber.
Subscribed At	No	Date and time recorded for subscribed at on this mailing list subscriber.
Unsubscribed At	No	Date and time recorded for unsubscribed at on this mailing list subscriber.

Field	Required	What it controls
Last Engaged At	No	Date and time recorded for last engaged at on this mailing list subscriber.

What happens next

Verify this Mailing Subscriber in **Campaign Deliveries** 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 **Mailing List**, and **Email** 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 **Status**, 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 **Mailing List**, and **Customer Link** 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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