Orders

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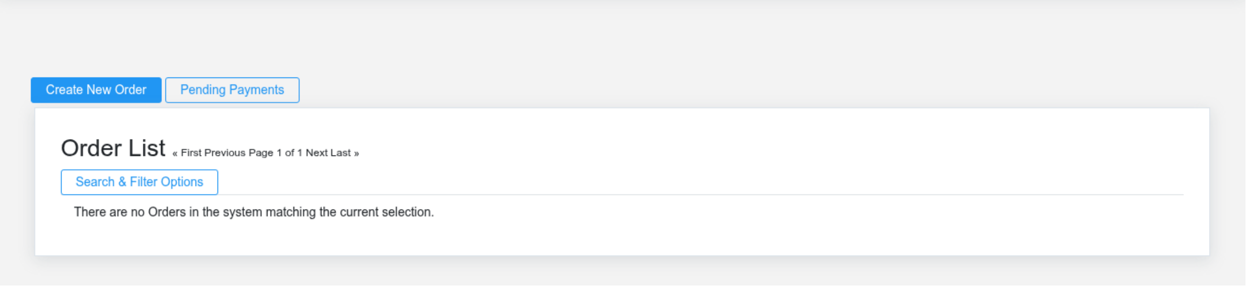
Purpose and when to use this record



The Orders overview screen in the Brisk documentation demo.

Review an online order from checkout through payment and fulfillment while preserving its customer, totals, address, and tracking state.

At a glance

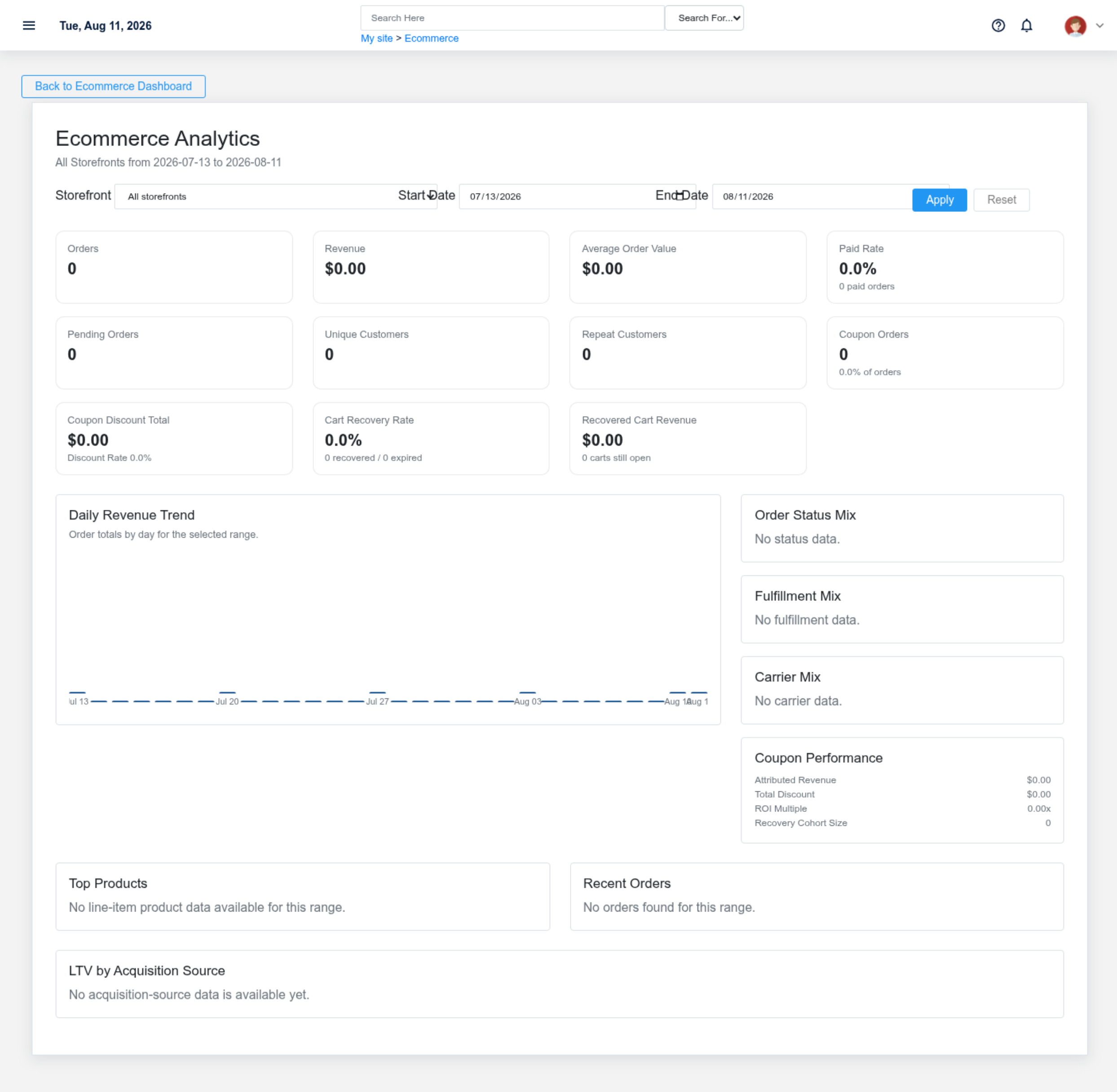
- **Identify it by: Order Number**, **Status**, **Tracking Number**, **Shipping Name**, and **Shipping Postal Code**.
- **Check its business context: Store**, **Sale**, **Customer Link**, **Fulfillment Method**, and **Ship From Warehouse**.
- **Why care:** Store, publication, consent, payment, and fulfillment 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 orders. 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 **Sale** records ready first. Those selections determine where this Order belongs and which later screens can find it.

Find and review orders



The Orders list screen in the Brisk documentation demo.

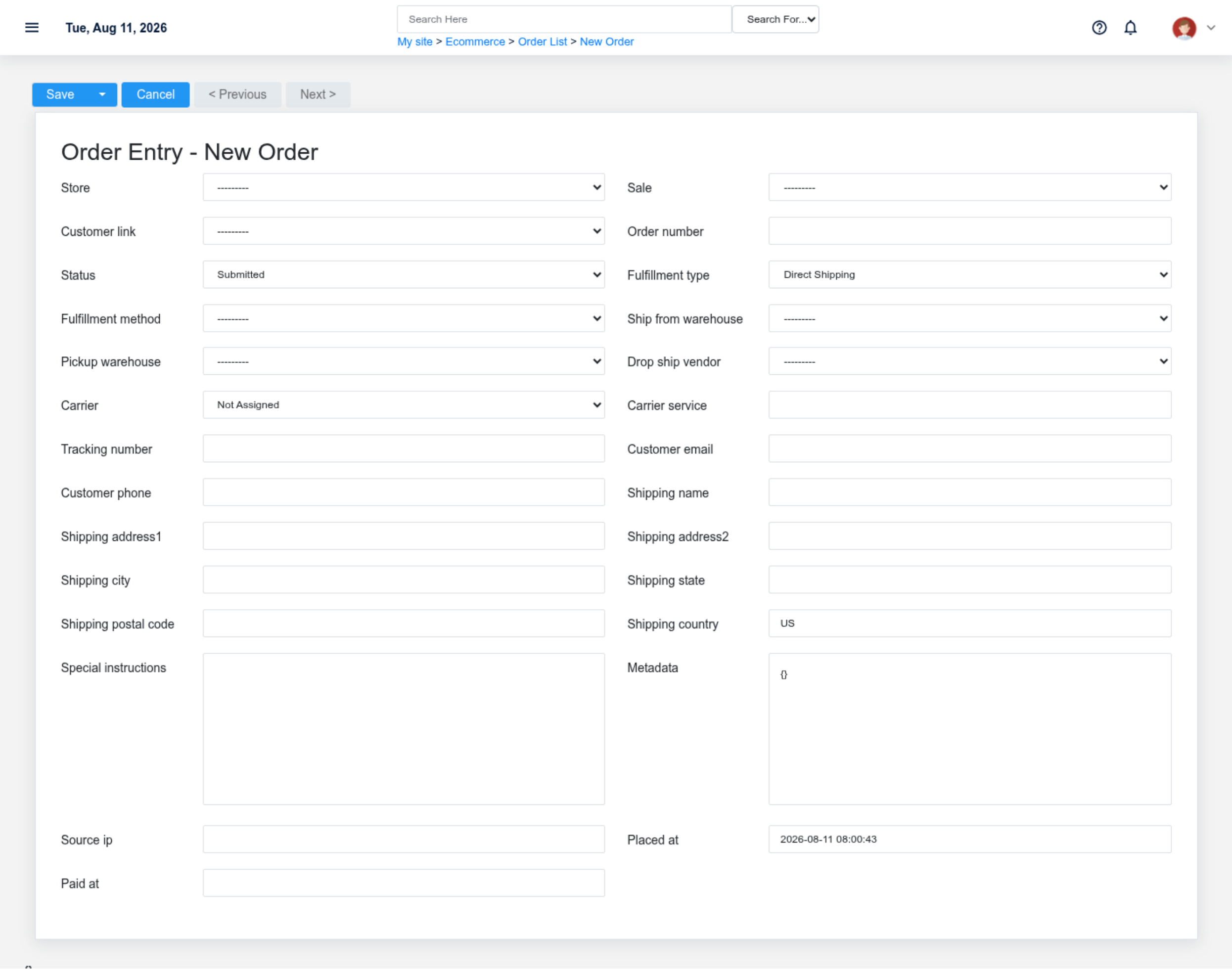
Use the Orders list to find the correct record before opening or changing it. Compare **Order Number**, **Status**, **Tracking Number**, **Shipping Name**, and **Shipping Postal Code**. Records with similar names or numbers can still belong to different **Store**, **Sale**, **Customer Link**, **Fulfillment Method**, **Ship From Warehouse**, and **Pickup Warehouse**, plus the remaining screen fields.

- Keyword search checks **Order Number**, **Customer Email**, **Tracking Number**, and **Sale #**.
- Narrow the list with **Store**, **Sale**, and **Customer Link** filters.

- The date filter uses **Placed At**; choose a range that matches the business event you are reconciling.
- The initial order emphasizes **Placed At**. Select a column heading when you need a different comparison.

Open the Order whose **Order Number**, **Status**, **Tracking Number**, **Shipping Name**, and **Shipping Postal Code** match the task. If it is missing, clear the list filters and recheck **Store**, **Sale**, **Customer Link**, **Placed At**, **Status**, and **Fulfillment Type**, plus the remaining screen fields rather than creating a replacement immediately.

Create an Order



The Orders create screen in the Brisk documentation demo.

Create an Order only after confirming that the source document or operational event has not already been entered.

1. Select the business context first: **Store**, **Sale**, **Customer Link**, **Fulfillment Method**, **Ship From Warehouse**, and **Pickup Warehouse**, plus the remaining screen fields.
2. Enter the required identifying and operational values: **Store**, **Sale**, and **Order Number**.
3. Review **Status**, **Fulfillment Type**, and **Carrier** deliberately; these choices control availability or workflow rather than merely describing the record.

4. Save the Order, then confirm **Order Number**, **Status**, **Tracking Number**, **Shipping Name**, and **Shipping Postal Code** on its detail page before continuing.

After saving: Move paid orders into the appropriate fulfillment method, record shipment or pickup progress, and investigate failed payment events before releasing goods.

Review Order details

Use the detail page as the shared record of what this Order currently means. Verify **Status**, **Fulfillment Type**, **Carrier**, and **Paid At** before relying on it for a decision.

Follow **Store**, **Sale**, **Customer Link**, **Fulfillment Method**, **Ship From Warehouse**, and **Pickup Warehouse**, plus the remaining screen fields to determine whether the issue is on this Order or on one of those linked records.

Next check: Move paid orders into the appropriate fulfillment method, record shipment or pickup progress, and investigate failed payment events before releasing goods.

Edit an existing Order

Edit this Order to correct or complete the same source document or operational event; use the supported reversal or follow-up workflow when the business event itself changed.

1. Open the detail page. Compare **Store**, **Sale**, **Customer Link**, **Fulfillment Method**, **Ship From Warehouse**, and **Pickup Warehouse**, plus the remaining screen fields with the supporting document or approved request.
2. Recheck **Customer Link**, **Status**, **Fulfillment Type**, **Ship From Warehouse**, **Pickup Warehouse**, and **Drop Ship Vendor**, plus the remaining screen fields. 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 Order now appears under the expected **Status**, **Fulfillment Type**, **Carrier**, and **Paid At**.

After the change: Move paid orders into the appropriate fulfillment method, record shipment or pickup progress, and investigate failed payment events before releasing goods.

Fields and business rules

Brisk stores 26 user-relevant fields for this Order, including 7 linked-record selections and 3 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 order.
Sale	Yes	The sale associated with this order.
Customer Link	No	The customer link associated with this order.
Order Number	Yes	The order number recorded for this order.
Status	No	Current status of this order. Available values: Submitted, Awaiting Payment, Awaiting Fulfillment, Fulfilled, Complete, Cancelled.
Fulfillment Type	No	The fulfillment type recorded for this order. Available values: Direct Shipping, In-Store Pickup, Drop Shipping, Freight Delivery.
Fulfillment Method	No	The fulfillment method associated with this order.
Ship From Warehouse	No	The ship from warehouse associated with this order.
Pickup Warehouse	No	The pickup warehouse associated with this order.
Drop Ship Vendor	No	The drop ship vendor associated with this order.
Carrier	No	The carrier recorded for this order. Available values: Not Assigned, USPS, UPS, FedEx, Freight Carrier, Other.
Carrier Service	No	The carrier service recorded for this order.
Tracking Number	No	The tracking number recorded for this order.
Customer Email	No	Email address recorded as customer email for this order.
Customer Phone	No	The customer phone recorded for this order.
Shipping Name	No	The shipping name recorded for this order.
Shipping Address1	No	The shipping address1 recorded for this order.
Shipping Address2	No	The shipping address2 recorded for this order.

Field	Required	What it controls
Shipping City	No	The shipping city recorded for this order.
Shipping State	No	The shipping state recorded for this order.
Shipping Postal Code	No	The shipping postal code recorded for this order.
Shipping Country	No	The shipping country recorded for this order.
Special Instructions	No	The special instructions recorded for this order.
Source Ip	No	The source IP recorded for this order.
Placed At	No	Date and time recorded for placed at on this order.
Paid At	No	Date and time recorded for paid at on this order.

What happens next

Move paid orders into the appropriate fulfillment method, record shipment or pickup progress, and investigate failed payment events before releasing goods.

Common mistakes and troubleshooting

- **The record will not save:** Recheck **Store**, **Sale**, and **Order Number** 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**, **Fulfillment Type**, **Carrier**, and **Paid At**, 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**, **Sale**, **Customer Link**, **Fulfillment Method**, **Ship From Warehouse**, and **Pickup Warehouse**, plus the remaining screen fields 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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