

Price Schedules

Price Schedules

Purpose and when to use this record

Define a named set of item prices that can be assigned to customers or business situations.

At a glance

- **Identify it by:** **Beginning Date**, **Ending Date**, and **Label**.
- **Check its business context:** **Warehouse**, and **Previous**.
- **Why care:** Warehouse, item, unit, quantity, and cost must describe the same physical movement. A wrong warehouse or unit can make availability and valuation misleading.
- **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 price schedules. 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 **Warehouse** records ready first. Those selections determine where this Price Schedule belongs and which later screens can find it.

Create a Price Schedule

Mon, Aug 10, 2026

Search Here Search For...

My site > Inventory > Price Schedule List > New Price Schedule

Save Cancel < Previous Next >

Price Schedule Entry - New Price Schedule

Beginning Date Ending Date

Label

Warehouse

Customer Classes

Customer Divisions

Previous Active ☐

The Price Schedules create screen in the Brisk documentation demo.

Create a Price Schedule 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: **Warehouse**, and **Previous**.
2. Enter the required identifying and operational values: **Beginning Date**, **Ending Date**, and **Warehouse**.
3. Review **Active** deliberately; these choices control availability or workflow rather than merely describing the record.
4. Save the Price Schedule, then confirm **Beginning Date**, **Ending Date**, and **Label** on its detail page before continuing.

After saving: Open **Price Schedule Items**, and **Price Schedules** and confirm the Price Schedule 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 Price Schedule

Delete this Price Schedule 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 **Active** to remove it from future use while preserving existing references.

Before confirming, check for related **Price Schedule Items**, and **Price Schedules**. 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 **Beginning Date**, **Ending Date**, and **Label**. After confirmation, return to the Price Schedules list and make sure only the intended Price Schedule was removed.

Review Price Schedule details

Use the detail page as the shared record of what this Price Schedule currently means. Verify **Beginning Date**, **Ending Date**, and **Active** before relying on it for a decision.

Follow **Warehouse**, and **Previous** to determine whether the issue is on this Price Schedule or on one of those linked records.

Next check: Open **Price Schedule Items**, and **Price Schedules** and confirm the Price Schedule appears with the intended label and availability. Keep the old value for historical records when changing it would split or relabel prior reporting.

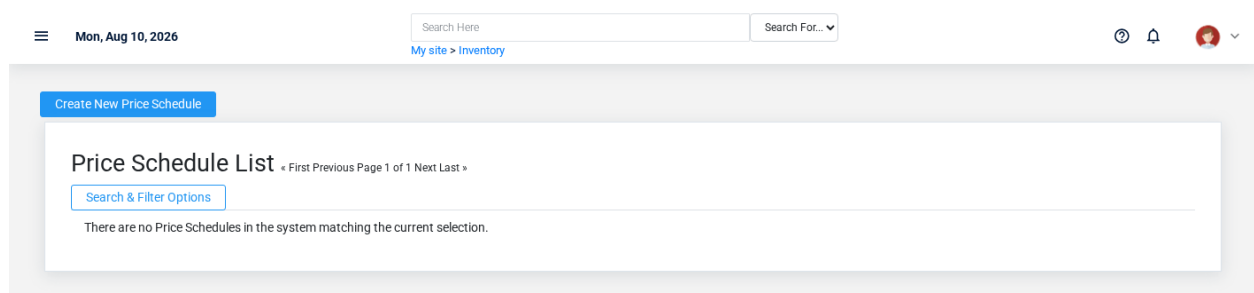
Edit an existing Price Schedule

Edit this Price Schedule 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 **Warehouse**, and **Previous** with the supporting document or approved request.
2. Recheck **Beginning Date**, **Ending Date**, **Warehouse**, and **Active**. These values are most likely to change warehouse availability, replenishment, quantities, and valuation.
3. Save the change, return to the list, and confirm that the Price Schedule now appears under the expected **Active**.

After the change: Open **Price Schedule Items**, and **Price Schedules** and confirm the Price Schedule 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 price schedules



The Price Schedules list screen in the Brisk documentation demo.

Use the Price Schedules list to find the correct record before opening or changing it. Compare **Beginning Date**, and **Ending Date**. Records with similar names or numbers can still belong to different **Warehouse**, and **Previous**.

Open the Price Schedule whose **Beginning Date**, and **Ending Date** match the task. If it is missing, clear the list filters and recheck **Active** rather than creating a replacement immediately.

Fields and business rules

Brisk stores 6 user-relevant fields for this Price Schedule, including 2 linked-record selections 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
Beginning Date	Yes	Records the date that this price schedule begins taking effect.
Ending Date	Yes	Records the date that this price schedule stops taking effect.
Label	No	Give this price schedule a specific name. If left blank, it will be labelled by its beginning date.
Warehouse	Yes	Sets the warehouse that this price schedule applies to.
Previous	No	Links to the price schedule that this one was copied from.
Active	No	If a given price schedule is marked as active for a warehouse, it will take effect. Only one price schedule may be active per warehouse.

What happens next

Open **Price Schedule Items**, and **Price Schedules** and confirm the Price Schedule 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 **Beginning Date**, **Ending Date**, and **Warehouse** 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 **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 **Warehouse**, and **Previous** 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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