# Customer Classes

# Customer Classes

## Purpose and when to use this record

Group customers so pricing, terms, reporting, or operating policies can be applied consistently.

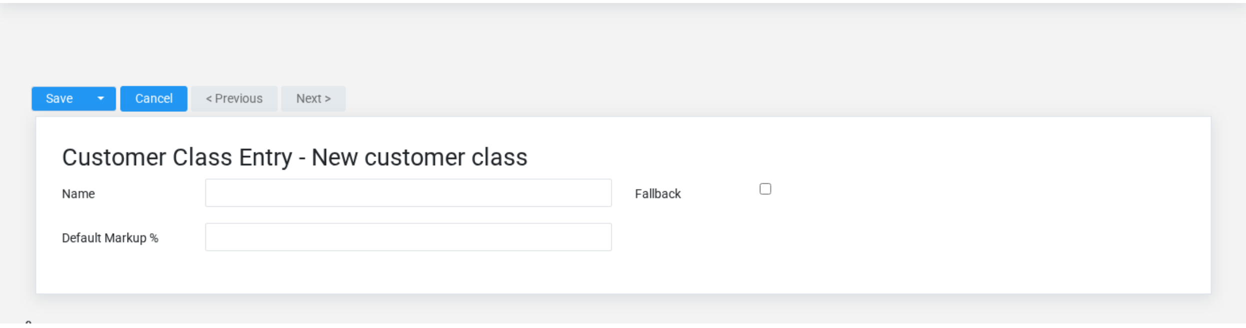
## At a glance

- **Identify it by: Name**.
- **Why care:** These master records supply defaults and choices to later transactions. Correct duplicates and inactive records before staff build more activity on the wrong record.

## Before you begin

You need the Brisk permission for the action you are taking on customer classes. 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.

## Create a customer class




The Customer Classes create screen in the Brisk documentation demo.

Create a customer class 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.
2. Enter the required identifying and operational values: **Name**.
3. Review **Fallback** deliberately; these choices control availability or workflow rather than merely describing the record.
4. Save the customer class, then confirm **Name** on its detail page before continuing.

After saving: Open **Customers**, **Price Rules**, **Price Schedule Items**, and **Price Schedules**, plus the remaining screen fields and confirm the customer class appears with the intended label and availability. Keep the old value for historical records when changing it would split or relabel prior reporting.

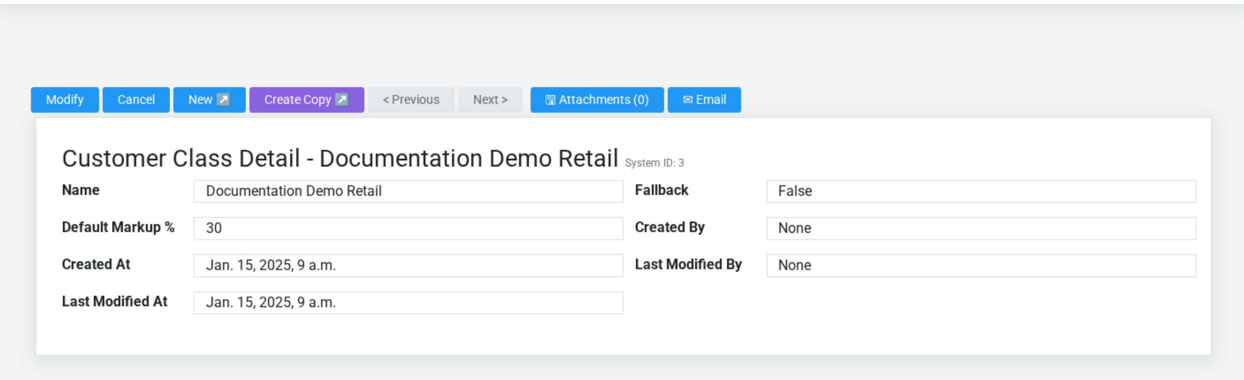
# Delete a customer class

Delete this customer class 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 **Customers**, **Price Rules**, **Price Schedule Items**, **Price Schedules**, and **Stores**. 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 Customer Classes list and make sure only the intended customer class was removed.

# Review customer class details



The Customer Classes detail screen in the Brisk documentation demo.

Use the detail page as the shared record of what this customer class currently means. Verify **Name** , **Fallback**, and **Default Markup %** before relying on it for a decision.

Compare the customer class with its source document or approved setup request before deciding that it needs correction.

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

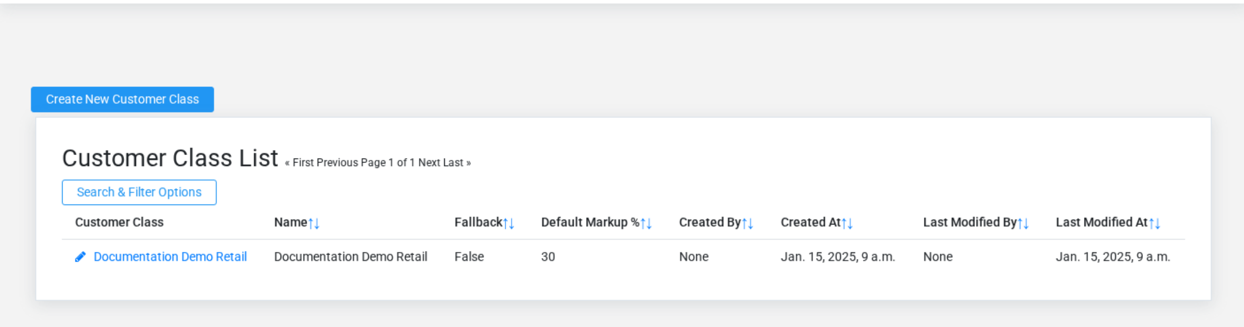
# Edit an existing customer class

Edit this customer class 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 **Name** with the supporting document or approved request.
2. Recheck **Fallback**. These values are most likely to change future transactions, defaults, assignment, pricing, and reporting.
3. Save the change, return to the list, and confirm that the customer class now appears under the expected **Name**.

After the change: Open **Customers**, **Price Rules**, **Price Schedule Items**, and **Price Schedules**, plus the remaining screen fields and confirm the customer class 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 customer classes



The Customer Classes list screen in the Brisk documentation demo.

Use the Customer Classes list to find the correct record before opening or changing it. Compare **Name**. Compare the full identifier rather than relying on a similar name.

- The initial order emphasizes **Name**. Select a column heading when you need a different comparison.

Open the customer class whose **Name** match the task. If it is missing, clear the list filters and recheck the identifying information shown on the screen rather than creating a replacement immediately.

# Fields and business rules

Brisk stores 3 user-relevant fields for this customer class, including 0 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 |
|---|--:|---|
| **Name** | Yes | Human-readable name for this customer class. |
| **Fallback** | No | If this option is selected, item prices will automatically be overwritten by price rules associated with this customer class. This should be enabled for your primary customer class to avoid potential pricing issues. Only one class may be configured as the pricing fallback. |
| **Default Markup %** | No | If the system is enabled to use price rules and allows automatic creation of them, this setting determines how much the markup will be for this customer class. |

# What happens next

Open **Customers**, **Price Rules**, **Price Schedule Items**, and **Price Schedules**, plus the remaining screen fields and confirm the customer class 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 **Name** and any message beside the field. A required related record may also be inactive or unavailable to your role.
- **The values look right but the result is wrong:** Compare this customer class with the source document or approved setup decision, then check the downstream screen where it is used.

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