Customer Tax Codes

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Purpose and when to use this record

Classify how a customer is taxed and which tax rules apply during sales.

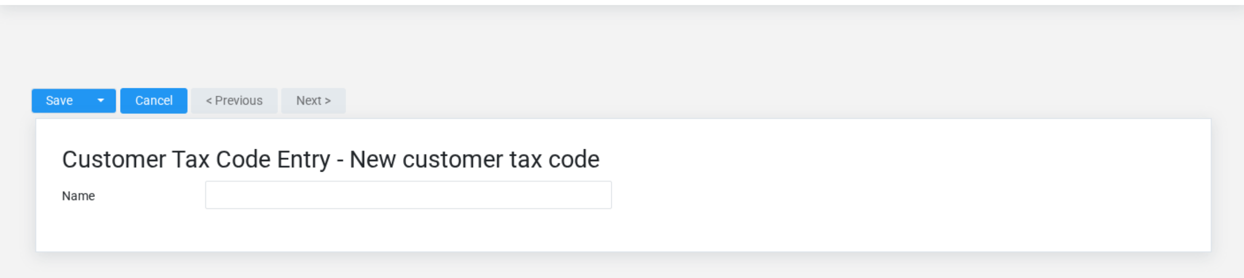
At a glance

- **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 tax codes. 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 tax code



The Customer Tax Codes create screen in the Brisk documentation demo.

Create a customer tax code 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 the identifying information shown on the screen against the source document or approved setup decision.
4. Save the customer tax code, then confirm **Name** on its detail page before continuing.

After saving: Open **Customers**, **Stores**, and **Tax Rules** and confirm the customer tax code appears with the intended label and availability. Keep the old value for historical records when changing it would split or relabel prior reporting.

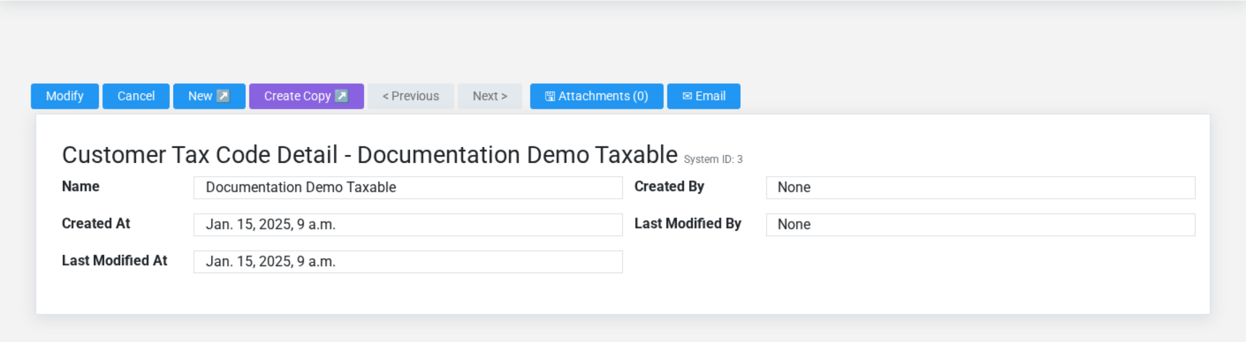
Delete a customer tax code

Delete this customer tax code 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**, **Stores**, and **Tax Rules**. 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 Tax Codes list and make sure only the intended customer tax code was removed.

Review customer tax code details



The Customer Tax Codes detail screen in the Brisk documentation demo.

Use the detail page as the shared record of what this customer tax code currently means. Verify **Name** before relying on it for a decision.

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

Next check: Open **Customers**, **Stores**, and **Tax Rules** and confirm the customer tax code appears with the intended label and availability. Keep the old value for historical records when changing it would split or relabel prior reporting.

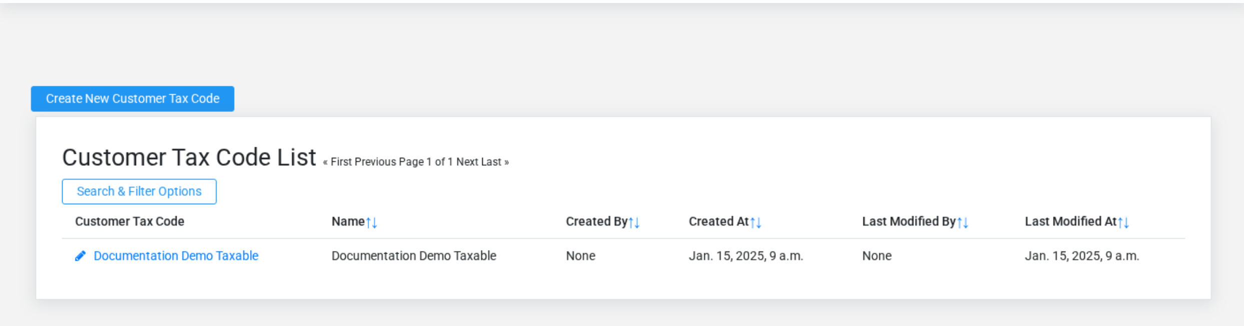
Edit an existing customer tax code

Edit this customer tax code 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 the identifying information shown on the screen. 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 tax code now appears under the expected **Name**.

After the change: Open **Customers**, **Stores**, and **Tax Rules** and confirm the customer tax code 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 tax codes



The Customer Tax Codes list screen in the Brisk documentation demo.

Use the Customer Tax Codes 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 tax code 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 1 user-relevant fields for this customer tax code, 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 tax code.

What happens next

Open **Customers**, **Stores**, and **Tax Rules** and confirm the customer tax code 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 tax code with the source document or approved setup decision, then check the downstream screen where it is used.

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