Customers

Customers

Purpose and when to use this record

Maintain the people and organizations that buy from the business, including billing, tax, pricing, credit, and contact defaults.

At a glance

- **Identify it by: Customer #**, **First Name**, **Last Name**, **Tax Code**, and **Last A/R Payment Date**.
- **Check its business context: Division**, **Salesperson**, **Class**, **Freight Zone**, and **Discount Schedule**.
- **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 customers. 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 **Class**, **Tax Code**, **Receivable Account**, and **Payment Terms** records ready first. Those selections determine where this Customer belongs and which later screens can find it.

Create a Customer

setting to update it)

Save | Cancel

Customer Entry - New Customer

Customer #		First Name	
Last Name		Company	
Display as Company	☐	Division	---------
Address Line 1		Address Line 2	
City		State	
Zip		Phone	
Fax		Email	
Auto Invoice Email	☐	Statement Email	☐
Salesperson	---------	Class	---------
Freight Zone	---------	Freight Option	---------
Discount Schedule	---------	Tax Code	---------
Ignore Restrictions	☐	Credit Limit	0
Credit Hold	☐	Receivable Account	---------
Account Balance	0	Written Off	☐
Exclude From Statements	☐	Finance Charge Exempt	☐
Payment Terms	---------	Account Number	
Allow Cash Discount	☑	Free On Board	Shipping Point
Labor Rate		Display Name	
Preferred Tender	Cash	Detailed Statements	☐

Contacts

Primary	First name	Last name	Job title	Address Line 1	Address Line 2	City	State	Zip	Primary Phone
☐									
☐									
☐									

Add Row

Item Contracts

Item +	Quantity	Begin Date	End Date	Contract Price	Quantity Purchased	Quantity Ordered	Delete
		Click to sele	Click to sele				✖
		Click to sele	Click to sele				✖
		Click to sele	Click to sele				✖

Add Row

Customer Addresses

Billing	Default Billing	Shipping	Default Shipping	Address Line 1	Address Line 2	City	State	Zip	Phone	Fax
☐	☐	☐	☐							
☐	☐	☐	☐							
☐	☐	☐	☐							

Add Row

The Customers create screen in the Brisk documentation demo.

Create a Customer 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: **Division**, **Salesperson**, **Class**, **Freight Zone**, **Discount Schedule**, and **Tax Code**, plus the remaining screen fields.
2. Enter the required identifying and operational values: **First Name**, **Last Name**, **Class**, **Tax Code**, **Receivable Account**, and **Payment Terms**.
3. Review **Display As Company**, **Auto Invoice Email**, **Statement Email**, **Freight Option**, **Ignore Restrictions**, and **Active Prescription**, plus the remaining screen fields deliberately; these choices control availability or workflow rather than merely describing the record.
4. Save the Customer, then confirm **Customer #**, **First Name**, **Last Name**, **Tax Code**, and **Last A/R Payment Date** on its detail page before continuing.

After saving: Verify this Customer in **Bookings**, **Contacts**, **Customer Addresses**, and **Customer Aging Snapshots**, plus the remaining screen fields before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

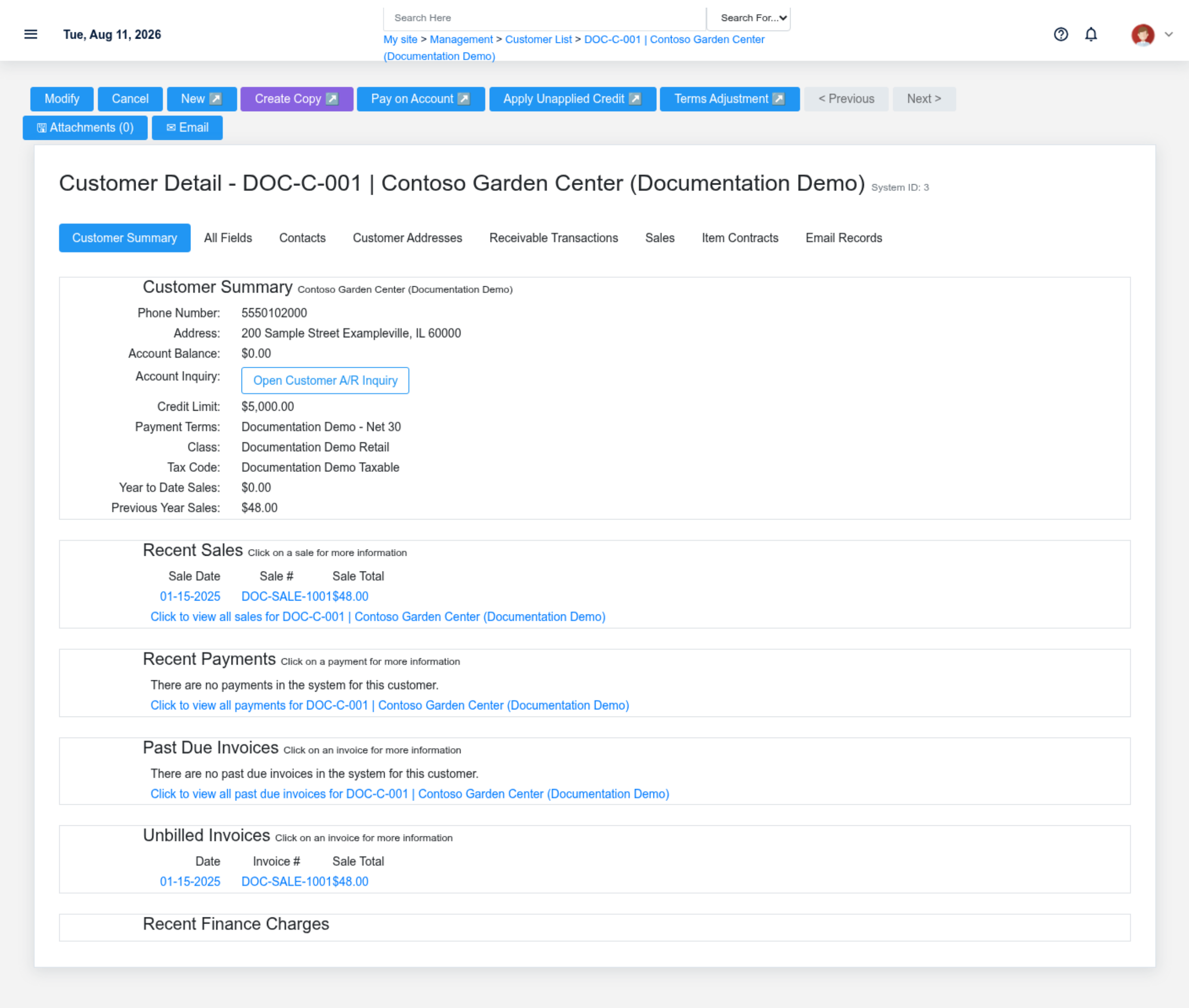
Delete a Customer

Delete this Customer 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 **Bookings**, **Contacts**, **Customer Addresses**, **Customer Aging Snapshots**, and **Customer Balance Import Lines**, plus the remaining screen fields. 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 **Customer #**, **First Name**, **Last Name**, **Tax Code**, and **Last A/R Payment Date**. After confirmation, return to the Customers list and make sure only the intended Customer was removed.

Review Customer details



The Customers detail screen in the Brisk documentation demo.

Use the detail page as the shared record of what this Customer currently means. Verify **Freight Option**, **Active Prescription**, **Account Balance**, **Last A/R Payment Date**, **Last A/R Payment Amount**, and **Free On Board**, plus the remaining screen fields before relying on it for a decision.

Follow **Division**, **Salesperson**, **Class**, **Freight Zone**, **Discount Schedule**, and **Tax Code**, plus the remaining screen fields to determine whether the issue is on this Customer or on one of those linked records.

Next check: Verify this Customer in **Bookings**, **Contacts**, **Customer Addresses**, and **Customer Aging Snapshots**, plus the remaining screen fields before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

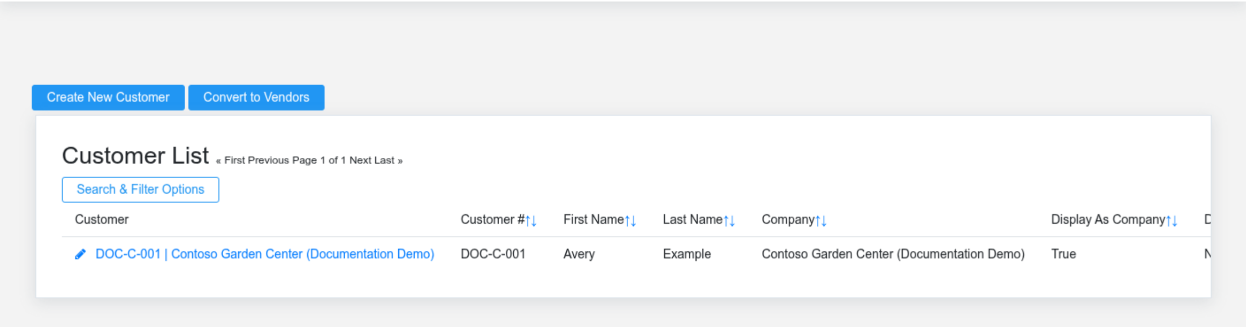
Edit an existing Customer

Edit this Customer 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 **Division**, **Salesperson**, **Class**, **Freight Zone**, **Discount Schedule**, and **Tax Code**, plus the remaining screen fields with the supporting document or approved request.
2. Recheck **Customer #**, **Class**, **Freight Option**, **Active Prescription**, **Receivable Account**, and **Account Balance**, plus the remaining screen fields. 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 now appears under the expected **Freight Option**, **Active Prescription**, **Free On Board**, and **Preferred Tender**.

After the change: Verify this Customer in **Bookings**, **Contacts**, **Customer Addresses**, and **Customer Aging Snapshots**, plus the remaining screen fields before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

Find and review customers



The Customers list screen in the Brisk documentation demo.

Use the Customers list to find the correct record before opening or changing it. Compare **Customer #**, **First Name**, **Last Name**, **Tax Code**, **Last A/R Payment Date**, and **Account Number**, plus the remaining screen fields. Records with similar names or numbers can still belong to different **Division**, **Salesperson**, **Class**, **Freight Zone**, **Discount Schedule**, and **Tax Code**, plus the remaining screen fields.

- Keyword search checks **Display Name**, **First Name**, **Last Name**, **Address Line 1**, **Address Line 2**, and **City**, plus the remaining screen fields.

Open the Customer whose **Customer #**, **First Name**, **Last Name**, **Tax Code**, **Last A/R Payment Date**, and **Account Number**, plus the remaining screen fields match the task. If it is missing, clear the list filters and recheck **Freight Option**, **Active Prescription**, **Free On Board**, and **Preferred Tender** rather than creating a replacement immediately.

Fields and business rules

Brisk stores 42 user-relevant fields for this Customer, including 8 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
Customer #	No	A customer's unique ID number. Leave this field blank for the system to generate one automatically.
First Name	Yes	The first name recorded for this customer.
Last Name	Yes	The last name recorded for this customer.
Company	No	The company recorded for this customer.
Display As Company	No	Whether the display as company option applies to this customer.
Division	No	The division associated with this customer.
Address Line 1	No	The address line 1 recorded for this customer.
Address Line 2	No	The address line 2 recorded for this customer.
City	No	The city recorded for this customer.
State	No	The state recorded for this customer.
Zip	No	The zip recorded for this customer.
Phone	No	The phone recorded for this customer.
Fax	No	The fax recorded for this customer.
Email	No	The email recorded for this customer.
Auto Invoice Email	No	If enabled, the system will attempt to automatically email receipts to this customer at their specified email address.
Statement Email	No	If enabled, the system will attempt to email statements to this customer at their specified email address.
Salesperson	No	The salesperson associated with this customer.
Class	Yes	The class associated with this customer.
Freight Zone	No	The freight zone associated with this customer.

Field	Required	What it controls
Freight Option	No	The freight option recorded for this customer. Available values: Line Item, Distributed, Other.
Discount Schedule	No	The discount schedule associated with this customer.
Tax Code	Yes	The tax code associated with this customer.
Ignore Restrictions	No	If this field is enabled, the selected customer will not be subject to restrictions placed on contract-restriced items. This would be appropriate for customers who are dealers or otherwise responsible for dealing with purchase restriction regulations.
Active Prescription	No	If enabled, this customer can be selected on sales invoices when prescription restriction is active.
Credit Limit	No	The credit limit value recorded for this customer.
Credit Hold	No	If this field is enabled, the selected customer will not be allowed to charge or purchase items by check regardless of balance and credit limit. They will still be allowed to make cash and credit/debit card purchases.
Receivable Account	Yes	The receivable account associated with this customer.
Account Balance	No	The account balance value recorded for this customer.
Last A/R Payment Date	No	Date and time recorded for last a/r payment date on this customer.
Last A/R Payment Amount	No	The last a/r payment amount value recorded for this customer.
Written Off	No	If this field is enabled, the selected customer will be treated as a bad debt. They will no longer accrue finance charges or be included in batch statement printing.
Exclude From Statements	No	If enabled, this customer will be skipped during batch customer statement creation and statement emailing for manual statement handling.

Field	Required	What it controls
Finance Charge Exempt	No	If enabled, this customer will not accrue finance charges regardless of payment terms.
Payment Terms	Yes	The payment terms associated with this customer.
Account Number	No	An optional field that allows storage of a legacy customer account number or other identifying account information.
Allow Cash Discount	No	If this field is disabled, this customer will not be allowed to receive cash discounts or early payment discounts.
Free On Board	No	The free on board recorded for this customer. Available values: Shipping Point, Destination Point.
Labor Rate	No	Sets the default labor rate for the service customer in the service module.
Display Name	No	The display name recorded for this customer.
Customer Pays Tonnage Tax	No	Enable for customers that use the product for manufacturing, resale, or other non-end-user purposes and therefore pay their own tonnage tax.
Preferred Tender	No	The customer will have this payment method selected by default when making a sale. Available values: Cash, Check, Debit Card, Credit Card, Customer Account.
Detailed Statements	No	If this field is enabled and an appropriate statement template is being used, the selected customer will receive line item detail on their monthly statements.

What happens next

Verify this Customer in **Bookings**, **Contacts**, **Customer Addresses**, and **Customer Aging Snapshots**, plus the remaining screen fields 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 **First Name**, **Last Name**, **Class**, **Tax Code**, **Receivable Account**, and **Payment Terms** 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:** Open **Division**, **Salesperson**, **Class**, **Freight Zone**, **Discount Schedule**, and **Tax Code**, 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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